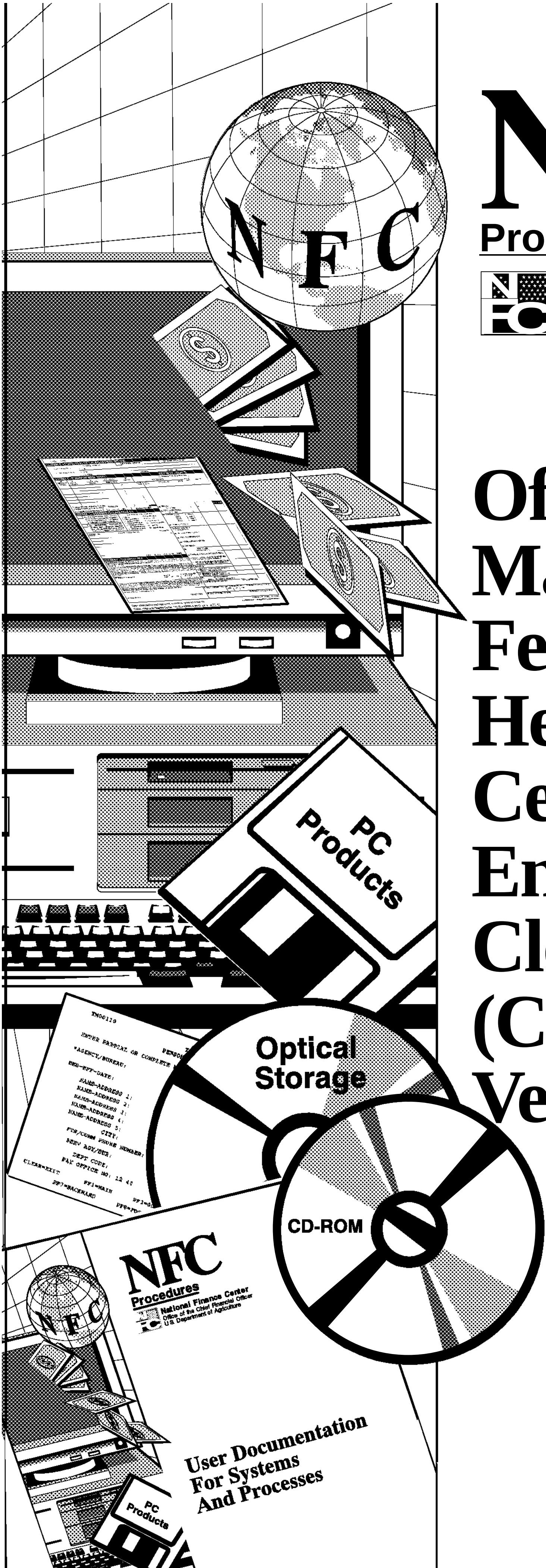


NFC
Procedures

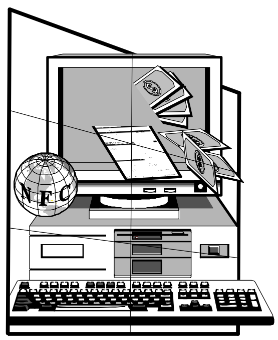
National Finance Center
Office of the Chief Financial Officer
U.S. Department of Agriculture

January 2005

Office of Personnel Management, Federal Employees Health Benefits, Centralized Enrollment Clearinghouse System (CLER) for Agencies Version 3.0

TITLE 10
CLER Manual

CHAPTER 1
CLER for Agencies



CLER for Agencies

National Finance Center
Office of the Chief Financial Officer
U.S. Department of Agriculture

IMPORTANT INFORMATION !

This publication is an illustrated version of CLER **online help**. Since the user can access and print online help directly from the application, online help is considered the primary source for information about CLER.

When you print online help directly from the application, the format is different from this illustrated version; however, the text is the same. Therefore, NFC provides the illustrated version only upon customer request.

For information about this publication, please contact the Government Employees Services Branch (GESB). Instructions for contacting GESB and other support sources are provided in the **About This Procedure** section of this publication.

Published and printed by the Government Employees Services Branch,
National Finance Center, U.S. Department of Agriculture
New Orleans, Louisiana

Changes To CLER As Of 11/10/04

The CLER for Agencies procedure has been updated to incorporate system and procedure changes. Changes in the procedure are identified by "►◄". The changes affecting users are summarized below.

- The Reports search criteria pages now give users the option of omitting totals from the reports they produce.
- System codes now include Reconciliation Reason Codes 590 and 591.
- On the Payroll Office Enrollees View and Payroll Office Enrollees Reconcile pages, a short definition is displayed next to the codes displayed in the Discrepancy, Reconciliation Reason, Reconciliation Action, and Corrective Action fields.
- The CLER Logon page displays links to information about the CLER application's accessibility and security.
- Agency users can display the Carrier Enrollees, Carrier Enrollees Search Results, Carrier Enrollees View, and Payroll Office Validate pages to query, view, and assist in resolving carrier enrollee records marked with Discrepancy Code 160.
- The Carrier Enrollment Codes Search Results and Carrier Enrollment Codes View pages now display the Region field.
- The Formatting Enrollment Data Files For Transmission To CLER and Quarterly Reconciliation Timeline sections have been updated to include information about how users can get copies of the CLER Payroll Office Enrollment File Layout and Quarterly Reconciliation Timeline documents.
- Forms Field Descriptions And Instructions have been updated to incorporate changes to the field completion requirements for CLER 2809 and 2810 data entry pages.
- Discrepancy Listing (Report 1) under the Reports section has been renamed Payroll Discrepancy Listing.
- Carrier Discrepancy Listing (Report 12) has been added to the Reports section.
- The Transmitting Enrollment Data Files To CLER section has been updated to include the most current list of methods available to agencies for transmitting FEHB enrollment data files to CLER.
- The Glossary section has been updated to include computer and Internet technology definitions.

Table Of Contents

List Of Figures

About This Procedure

This procedure provides instructions for accessing and operating the Office of Personnel Management (OPM), Federal Employees Health Benefits (FEHB), Centralized Enrollment Clearinghouse System (CLER). The following information will help you use the procedure more effectively and locate further assistance if needed.

How The Procedure Is Organized

The major parts of this procedure are described below:

Introduction presents an overview of CLER, including security access information and instructions for accessing the system. It also provides basic operational information, including how to get online help while using the CLER application.

CLER Processing Instructions provides step-by-step instructions for the processes performed in CLER.

CLER Field Descriptions And Instructions contains descriptions and completion instructions for the fields displayed on the CLER pages.

CLER Reference Tables includes tables of valid values for completing the fields on the CLER pages.

Exhibits contains illustrations of forms.

Glossary defines terms you need to know.

Heading Index provides an alphabetical list of all headings in the procedure. When a heading is referenced, you can use this index to locate the page number.

To keep you informed about new or changed information related to this system, the National Finance Center (NFC) issues short publications called bulletins. This procedure and all related bulletins are listed in the NFC Publications Catalog. The NFC Publications Catalog is also available online from the NFC home page (*www.nfc.usda.gov*). Users can choose to view and/or print bulletins from the list provided in the Publications Catalog.

What Conventions Are Used

This procedure uses the following visual aids to identify certain kinds of information:

Convention	Example
Important extra information is identified by a note.	**Note:** The values listed in the drop-down menus are listed in numerical and alphabetical order.
Figure references link figures with the text. These references are printed in bold sans serif font.	The CLER Logon page (**Figure 1**) is displayed.
References to headings in the procedure are printed in the same font as figure references. **Note:** When a heading is referenced in the procedure, you can use the Heading Index to locate the page number.	For instructions on using the Payroll Office Information page, see **Viewing Payroll Office Information Records**.
References to command buttons are printed in bold and enclosed in brackets.	Click **[View]** next to the applicable record.
Field names are printed in the margin. Field specifications are printed in *italics*. **Note:** Field entries are identified as *required*[1], *conditional*[2], *optional*[3], *optional default*[4], or *no entry*[5].	**Payroll Office ID** *Optional, alphanumeric, 8 positions* Type the payroll office identification number.

[1]***Required***	*You must enter data in the field. (Note: All required fields on CLER pages are marked with * to distinguish required entries from optional entries. The required fields must be completed to avoid rejection.)*
[2]***Conditional***	*You may be required to enter data based on criteria indicated in the field instructions.*
[3]***Optional***	*You may elect to enter data in the field. If the field is left blank, no data is system generated.*
[4]***Optional default***	*You may elect to enter data. If the field is left blank, the system generates a default entry.*
[5]***No entry***	*You do not enter data in the field. The field instruction states the reason for no entry.*

Who To Contact For Help

For questions about requesting access to CLER, contact the CLER Operations and Reconciliation Unit at **504-255-3270** .

For questions about CLER processing (including help with unusual conditions), contact the CLER Operations and Reconciliation Unit at **504-255-3270** .

For questions about access authority, contact your organization's computer system security officer. When necessary, your computer system security officer may contact NFC's Information Systems Security Office at ►**504-426-0413** ◄

PART 1.

INTRODUCTION

This part contains the following sections:

Overview

CLER receives electronic FEHB enrollment data from health insurance carriers and Federal payroll offices on a quarterly basis. The CLER database stores, maintains, processes, edits, and combines the data from the carriers and compares it to the data from the payroll offices. NFC takes a proactive approach to resolve any discrepancies between the carrier data and the payroll office data identified during the operation of CLER by working with Federal agencies (payroll offices and personnel offices), carriers, and individual enrollees, as needed.

Authorized users of CLER can access data when security access is requested by the computer system security officer and clearance is provided by the NFC Information Systems Security Office (ISSO).

This section presents more information under the following topics:

System Capabilities And Interface

Payroll offices electronically submit quarterly FEHB enrollment data directly to NFC. Carriers submit their FEHB enrollment data quarterly to the OPM data hub located in Macon, Georgia, which in turn submits the data to NFC. Upon receipt, the enrollment data is processed into NFC's DB2 mainframe. The mainframe database stores, maintains, processes, edits, matches, combines, and compares the enrollment data from the payroll offices to the data from the carriers using edit tables.

After the data is entered into the mainframe, the data is sent to the CLER Web server where the agencies, carriers, OPM, and NFC access the data for inquiries, contact information updates, discrepancy corrections, and report generation.

Using the Web server, an agency may query on its data. To assist the agency with the reconciliation process, reports are developed using the report generation capabilities that are modeled on NFC's reporting center. Using the data that resides in CLER, users can tailor their reports to meet their specifications. Based on the agency analysis, a discrepancy with the carrier data may be encountered. The agency may submit forms requesting corrective action from the carrier electronically using the CLER Web server. The corrective action request file is forwarded from the Web server through the NFC mainframe, where it is processed and transmitted to the carrier through OPM's data hub.

Carriers respond to the corrective action request directly through the Web server. The carrier response and update is maintained on the database and is available for inquiry by the agencies. To further assist the carrier in the response, the carrier may develop customized reports in CLER.

Agencies and carriers have primary contacts in each of their organizations and must maintain the contact information in CLER.

OPM oversees the operation of CLER. To perform this role, OPM has inquiry and report capabilities for all carriers and agency participants. The system provides statistical information relative to the number of discrepancies, occurrence rates, corrective actions, enrollment changes, etc. This information provides OPM with data needed to effectively manage and oversee the FEHB reconciliation process.

NFC maintains the system, updates all tables and edits as necessary, and maintains system security.

Reports Through CLER

CLER supports and facilitates report creation. CLER report creation is modeled on NFC's Reporting Center, which is an integral part of several other NFC applications.

Selection criteria, sorts, and formats are built into the CLER reporting database. With the flexibility of the reporting options offered, users are able to design custom reports from the options displayed on the Reports Selection page.

Forms

Forms associated with CLER activities are described below.

Note: The 2809 and 2810 options in CLER are formatted to include data elements from the forms listed below, as well as the data elements from the 2809 and 2810 options in Employee Express.

SF-2809, Health Benefits Election Form (See **Exhibit 1** in **Part 5**.)**.** This form is used by (1) Federal employees eligible to enroll in or currently enrolled in the FEHB program, (2) former spouses of Federal employees eligible to enroll in or currently enrolled in the FEHB program under the Spouse Equity law, and (3) individuals eligible for temporary continuation of coverage under the FEHB program to:

- Enroll eligible persons in the FEHB program.
- Elect not to enroll in the FEHB program.
- Change an enrollee's plan.
- Change coverage within a plan.
- Cancel the FEHB enrollment of an enrollee who elected to end his/her coverage though he/she continues to be eligible for it, and no extension of coverage is granted.

SF-2809-1, Health Benefits Election Form (See **Exhibit 2** in **Part 5**.)**.** This form is used by (1) annuitants (other than Civil Service Retirement System (CSRS) and Federal Employees Retirement System (FERS) annuitants) eligible to enroll in or currently enrolled in the FEHB program, including individuals receiving monthly compensation from the Office of Workers' Compensation Programs, (2) former spouses of annuitants (other than CSRS and FERS annuitants) eligible to enroll in or currently enrolled in the FEHB program under the Spouse Equity law, and (3) individuals eligible for temporary continuation of coverage under the FEHB program to:

- Enroll in the FEHB program.
- Change FEHB enrollment from Self Only to Self and Family and/or from the present plan or option to another plan or option.
- Change FEHB enrollment from Self and Family to Self Only.
- Cancel FEHB enrollment.

SF-2810, Notice of Change in Health Benefits Enrollment (See **Exhibit 3** in **Part 5**.)**.** This form is used to:

- Terminate the enrollment of (1) an enrollee employed by the Federal Government who leaves Government service, or (2) an enrollee employed by the Federal Government who exceeds 365 days in non-pay status and is eligible for a 31-day extension of coverage.
- Reinstate enrollment.
- Change the name of an enrollee.
- Change the enrollment to a survivor annuitant.

CLERP, Security Access, Payroll Office/Human Resource Office Personnel (See **Exhibit 4** in **Part 5**.)**.** This form is completed by an agency's computer system security officer and submitted to NFC's ISSO to request CLER access for agency personnel.

Responsibilities

Following are the general responsibilities of the primary organizations involved in the operation of CLER.

Agency:

- Appoints a primary and an alternate computer system security officer who coordinates all requests with NFC for CLER access authorization.
- Transmits FEHB enrollment data to NFC (payroll offices only).
- Establishes and maintains payroll and personnel office contact information in CLER.
- Reviews and researches current and/or prior quarter enrollee transmission records.
- Reviews and researches current and/or prior quarter enrollee discrepancy records.
- Enters reconciliation action codes to record corrective actions.
- Enters reconciliation reason codes for discrepancies.
- Views responses from the carrier on corrective action taken.
- Inputs, faxes, or mails 2809 and 2810 data for carrier corrective actions/corrections.
- Verifies that corrective actions/corrections have resolved discrepancies.

Carrier:

- Appoints a primary and an alternate computer system security officer, who coordinate all requests with NFC for CLER access authorization.
- Transmits FEHB enrollment data to the OPM data hub in Macon, Georgia.

- Establishes and maintains carrier and carrier plan contact information in CLER.
- Reviews and researches current and/or prior quarter enrollee transmission records.
- Reviews and researches current and/or prior quarter enrollee discrepancy records.
- Enters response codes to respond to the corrective action requests from agencies.

  Note: The carrier takes no action unless authorized by the responsible agency.

OPM:

- Oversees and manages the reconciliation process.
- Views all carrier and agency enrollment records.
- Views all contact information.
- Views all table information.
- Takes action to ensure user compliance.

NFC:

- Operates the CLER system.
- Provides operational support to resolve reconciliation problems.
- Researches and resolves system inquiries.
- Provides subject matter expertise.
- Provides training to CLER users.
- Coordinates system/user compliance issues with OPM.
- Maintains security over all data residing in CLER.

Getting Started

This section presents the following topics:

Using CLER

CLER is a Web-based application. To use CLER, you must have access to the Internet and knowledge of Internet navigation.

For more information, see:

System Security

At the request of OPM or OPM's delegated authority, NFC grants users the authority to access the CLER application. Users request access through their computer system security officer. Each user (agencies and carriers) is required to establish a primary and an alternate computer system security officer, who coordinate all requests with NFC for CLER access authorization. Users, with approval from their organizations, are allowed to have access to appropriate resources and OPM may grant access permission to other users or groups of users. Resource access permission is limited to the extent determined by OPM, NFC, and the approved user organizations (i.e., participating agencies, carriers, auditors, etc.).

The User's Computer System Security Officer will:

- Obtain organization and/or owner authorization approval(s) and request user IDs according to the user's computer system security policy.
- Submit the request for access to CLER to NFC's Information Systems Security Office (ISSO).
- Suspend user IDs upon the employee's termination or assignment change.
- Notify NFC of any changes in the authority or of the termination of an employee in their organization.

- Consult with NFC's ISSO on security matters related to the use of NFC's facilities.
- Monitor users' activity for access violations.

NFC's Computer System Security Officer will:

- Grant authority to use/access the computer facilities based on OPM's authority and the user's requirements.
- Establish, control, and maintain user identification.
- Log all unauthorized access attempts and furnish reports to the respective user computer system security officer for appropriate action.
- Monitor security concerns of OPM and the user computer system security officer related to NFC's facilities and resources.

Requesting Access To CLER

NFC will grant authority to use/access its facilities to individual users at the request of OPM and the user's computer system security officer. Every user is assigned a unique identification number which defines the specific information a user has access to based on job responsibilities, need to know, and the user's computer system security policy. Communications related to gaining access to CLER must go through the user's computer system security officer to NFC. To gain access to CLER, the user's computer system security officer must complete the Form CLERP, CLER Security Access, Payroll Office/Human Resource Office Personnel (**Exhibit 4** in **Part 5**), and send it to NFC's ISSO via fax at **504-253-5798** or e-mail at *nfc.securityofc@usda.gov.*

For an electronic and/or paper copy of Form CLERP, CLER Security Access, Payroll Office/Human Resource Office Personnel, ask your organization's computer system security officer to contact the CLER Operations and Reconciliation Unit at **504-255-3270** . For questions about access authority, contact your computer system security officer. When necessary, your computer system security officer may contact NFC's ISSO at **504-426-0413** or via e-mail at *nfc.securityofc@usda.gov.*

Formatting Enrollment Data Files For Transmission To CLER

For information about formatting enrollment data files for transmission to CLER, payroll offices should refer to the CLER Payroll Office Enrollment File Layout document. For a copy of this document, contact the CLER Operations and Reconciliation Unit at **504-255-3270** .

Transmitting Enrollment Data Files To CLER

Agencies may use one of the following options to transmit FEHB enrollment data files to CLER. For questions about transmitting FEHB enrollment data files to CLER, contact NFC's Network Services Branch at **504-426-2600** .

Note: Internet use requires an IPSEC, 3DES, VPN tunnel.

Network to Network VPN

Checkpoint Firewall VPN. This option may be used by agencies desiring to utilize Checkpoint's VPN technology. NFC provides a Checkpoint externally-managed Peer

Gateway at NFC's site and NFC's Recovery Operations Center. The agency's firewall version must support compatible ISAKMP, IPSEC, 3DES, VPN tunnels. The agency must coordinate firewall version upgrades with NFC to ensure VPN compatibility.

Cisco PIX Firewall site to site VPN. This option may be used by agencies desiring to utilize their Cisco PIX VPN technology. NFC provides the Peer Gateway at NFC's site and NFC's Recovery Operations Center. The agency's firewall version must support compatible ISAKMP, IPSEC, 3DES, VPN site to site tunnels. The agency must coordinate firewall version upgrades with NFC to ensure VPN compatibility.

Cisco's VPN Security Router's site to site VPN. This option may be used by agencies desiring to utilize Cisco's Router VPN technology. NFC provides the Peer Gateway at NFC's site and NFC's Recovery Operations Center. The agency's Cisco hardware/software must support compatible ISAKMP, IPSEC, 3DES, VPN site to site tunnels. The agency must coordinate version upgrades with NFC to ensure VPN compatibility. NFC does not support Cisco's Client VPN option.

Private Network Connectivity

Agency's Intranet extended to NFC. For agencies desiring to extend their private Intranet to NFC, NFC provides either an Ethernet or Serial interface on NFC's Premise router for connection of the agency's Intranet. The agency will be responsible for providing any additional circuits and any necessary Customer Premise Equipment. The additional circuits and any Customer Premise Equipment provided at NFC must also be provided by the agency at NFC's Recovery Operations Center.

Available Option (Client to Network)

SecuRemote Client to Checkpoint Firewall. Agencies may also request SecuRemote Client software and access to NFC via TCP/IP through the proper management channels and their NFC Security Officer. The request must include the user's ID for access to NFC, e-mail address, and telephone number. The agency will be given directions to download and install the software. This provides only agency application TCP/IP connectivity and the user must have other network connectivity to receive NFC print output. The SecuRemote Client option does not provide support for print servers.

Direct Web Input Into CLER

Direct Web. An agency user logs into CLER and accesses the online entry option which allows FEHB enrollment data to be entered directly into CLER.

General Information

The following applies to all options.

- The agency must provide the TN3270 client software.
- The agency must provide the FTP client software
- If the Network to Network option is used, the agency must provide the LPD (print server) hardware/software.
- If the Client to Network option is used, the agency must also have other print capability with NFC.

- The SecuRemote Client option is the only option which allows private (RFC 1918) IP addresses to access NFC's network.
- Agencies assume responsibility for data once it enters their networks.
- Agencies must ensure only authorized users access NFC via their network connections.◄

►Timeline For CLER Quarterly Reconciliation◄

The CLER reconciliation process includes four reconciliation quarters per year. The first quarter begins on March 1, the second quarter begins on June 1, the third quarter begins on September 1, and the fourth quarter begins on December 1. ►Weeks before a quarter begins, the CLER Operations and Reconciliation Unit sends a copy of the quarterly reconciliation timeline for that quarter to agencies and carriers via e-mail. Please refer questions about the quarterly reconciliation timeline to the CLER Operations and Reconciliation Unit at **504-255-3270** .◄A sample of the quarterly reconciliation timeline for the second quarter is described in the table listed below.

Note: In the sample timeline listed below, payroll office enrollment data is transmitted directly to CLER and consists of data as of the pay period paid by payroll offices between June 1 and June 15. Carrier enrollment data consists of data as of June 1 and is transmitted to CLER via the OPM data hub between June 1 and June 20.

Quarterly Reconciliation Timeline

Date (mo/day)	Description
6/1	Carriers and payroll offices may begin transmitting enrollment data to CLER via electronic input files. Reminders are e-mailed to carriers and payroll offices regarding the current quarterly due date for the submission of enrollment data to be reconciled.
6/15	This is the current quarterly due date for carriers and payroll offices to transmit their quarterly enrollment data to CLER.
6/17	Reminders are e-mailed to the carriers and payroll offices that have not submitted their quarterly enrollment data.
6/20	This is the last day that enrollment data transmitted from carriers and payroll offices is accepted for inclusion into the reconciliation process. Any transmissions of enrollment data that are received after this date will not be included in the reconciliation process for this quarterly cycle. An e-mail informing the submitter that the transmission is accepted or rejected is generated within 1 workday after receipt.
6/21	The OPM data hub in Macon, Georgia, provides CLER with the last files transmitted by carriers.
6/24 - 6/26	The information required to produce discrepancy reports is processed and made available to agencies and carriers through CLER. The discrepancy report information will remain available until further notice. The agencies have approximately 30 days to research discrepancies and respond with resolutions.
6/26	Lists of carriers and payroll offices that have not submitted their quarterly enrollment data are made available to OPM through CLER.
7/23	Reminders are e-mailed to the agencies that did not provide responses to the discrepancy reports.

Quarterly Reconciliation Timeline

Date (mo/day)	Description
7/29	Responses from agencies are due. ▬ If the research shows that the payroll or personnel office's records are incorrect, the payroll or personnel office will correct the error(s) in their payroll/personnel system and enter the reconciliation reason code in CLER. ▬ If the research shows that the carrier's records are incorrect, the agency will enter the results of their research in CLER for carrier correction. The agency will submit supporting data through CLER or hard copy to the carrier.
7/29 - 8/1	On July 29 after 4 p.m., CLER will initiate the process of transferring the corrective action request file to the OPM data hub located in Macon, Georgia, for the retrieval of the file by carriers. CLER will notify carriers via e-mail when the data is available after OPM's data hub has completed its processing.
8/1 - 8/31	Carriers enter corrective action codes in CLER to indicate what actions were taken to resolve the discrepancies.
8/23	Reminders are e-mailed to the carriers that have not confirmed the corrective actions taken as of this date.
8/26	Reminders are e-mailed to all payroll offices and carriers that the next quarter files will be due between September 1 and September 19.

Viewing The Online Application

The CLER application was designed to use a screen resolution of 800 X 600 dpi. The resolution you see is controlled by your personal computer's monitor and video card settings. Any resolution can be used; however, lower resolutions may force you to scroll the screen to view all data on the screen.

The appearance of the page is also controlled by your browser's font setting. If the words on the screen appear too large or too small, you can adjust them yourself by using the browser font adjustments.

Browser Compatibility

This application is currently compatible with the following browsers: (1) Microsoft Internet Explorer (IE) Version 5.5 (Service Pack 2) and above, and (2) Netscape Version 6.2 and above. Some successful testing has been done with the Opera Version 6; however, CLER may not be completely compatible with this browser. CLER is currently not compatible with WebTV systems.

Recommended Browser Usage

This application performs best when using IE because the type of tabular data displayed on most CLER screens usually appears twice as fast in an IE browser than in Netscape. Netscape can be used; however, IE should provide better performance.

Browser Settings

The CLER application requires that your browser settings allow the use of JavaScript and cookies. These tools are used to perform local entry edits on the input screens and to ensure that NFC sends the correct data to the correct user each time you click an option in the application. Some browsers may show the JavaScript option as Jscript or Active Scripting.

For best results, the browser cache settings should never be set to zero. This option may be listed as ***amount of disk space*** in some browsers.

Some browsers may also perform poorly if the ***Document in cache should be compared to the document on the Server*** or the ***Check for newer versions of stored pages*** option is set to ***NEVER***. Any other setting will provide better performance.

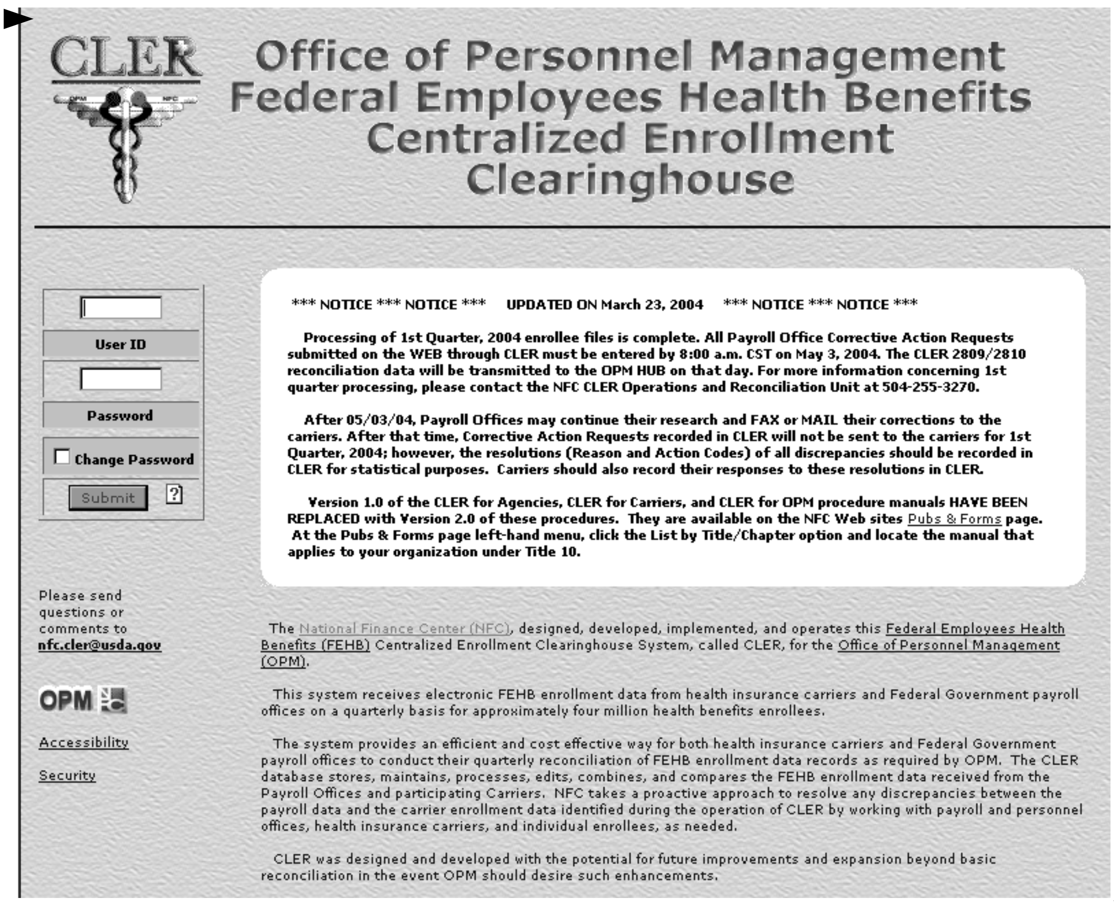
Starting CLER

To start CLER:

1. Access the Internet and log on to the CLER Web site at *https://www.nfc.usda.gov/cler*. The CLER Logon page (**Figure 1:1**) is displayed.

   Note: ►To display information about the CLER application's accessibility and security, click Accessibility or Security, as applicable.◄

►



◄

Figure 1:1. CLER Logon Page

2. Complete the fields as indicated under the **CLER Logon Field Instructions** in **Part 3** and click **[Submit]**. The CLER Main Menu (**Figure 1:2**) is displayed.

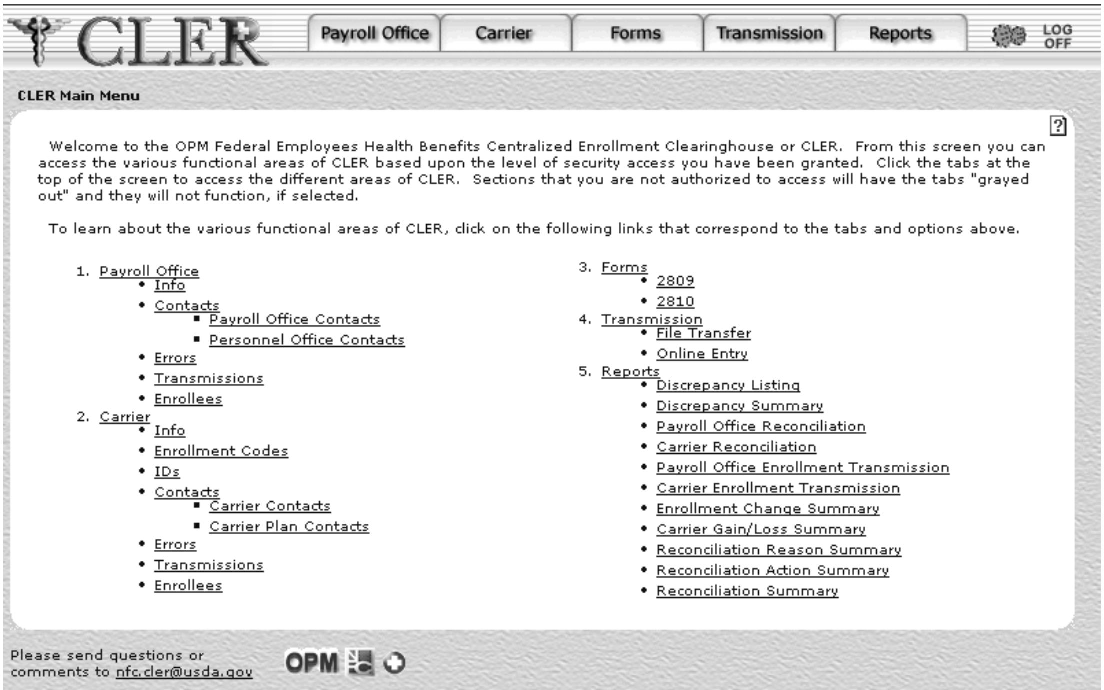


Figure 1:2. CLER Main Menu

Below is a brief description of each option displayed on the CLER Main Menu.

- **Payroll Office.** Used to view and maintain payroll office FEHB enrollment information.
- **Carrier.** Used to view carrier FEHB enrollment information.
- **Forms.** Used to view and transmit Forms 2809 and 2810 information.
- **Transmission.** Used to view and maintain CLER payroll office transmission information.
- **Reports.** Used to produce reports.
- **“Gears” (icon).** Used to view information about CLER processing schedules and system codes.

Exiting CLER

To exit CLER, click **[Log Off]** on any CLER page. The CLER Logoff page (**Figure 1:3**) is displayed and the current session on the CLER Web site is terminated. For the highest security when logging off, close the browser to keep another user from accessing pages in the browser memory.

Figure 1:3. CLER Logoff Page

CLER Operating Features

CLER is designed in a Web format, providing mouse-driven point-and-click functionality, command buttons, and other Web features. This section reviews these basic features and describes other features that are specific to CLER.

This section presents the following topics:

CLER Function Keys

CLER Data Entry

CLER Menu Bar

CLER Command Buttons

CLER Pop-up Messages

CLER Search Criteria Data Entry Fields

CLER Drop-Down Menu Data Entry Fields

CLER Radio Buttons

CLER Online Help

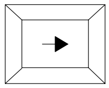
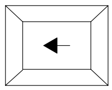
CLER Function Keys

CLER is designed for a mouse-driven environment; however, certain keys may be used to perform certain functions. Your keyboard includes the following function keys that can be used in CLER:

Function Keys

Key	Description
Tab	Used to move to the next field.
↑	Used to move through a drop-down menu.
↓	Used to move through a drop-down menu.

Function Keys

Key	Description
	Used to move through a drop-down menu.
	Used to move through a drop-down menu.

CLER Data Entry

After data is entered in a data entry field, the field remains active until an action is taken to advance the cursor to the next field. This may be accomplished by using the mouse to point and click the next field or by using the **[Tab]** key.

CLER Menu Bar

The menu bar is displayed below the title bar on all CLER pages except pop-ups. Each option on the menu bar displays other options for viewing and/or maintaining records. Options may vary depending on the page.

CLER Command Buttons

CLER command buttons carry out the action described in the button’s name. The following command buttons are used throughout CLER:

Command Buttons

Button	Description
Add	Used to open a page to add records.
View	Used to open a page to view data on existing records.
Update	Used to open a page to update data on existing records.
Delete	Used to delete an existing record.
Release	Used to release a record for processing.
Add Record	Used to add data entered on a page.
Update Record	Used to update an existing record.
Clear Data	Used to refresh a page.

Command Buttons

Button	Description
Submit	Used to submit criteria to search for records. If the fields for all search criteria are optional, the user may leave those fields empty and click **[Submit]** to display all records.
Reset	Used to refresh search criteria pages.
Save Form	Used to save data entered on Forms 2809 and 2810 pages.
Update Form	Used to update data on existing Forms 2809 and 2810 records.
Cancel	Used to (1) return to the previous page and (2) refresh payroll and personnel office contact data entry pages.
Reconcile	Used by agencies to open a page to reconcile FEHB enrollee records.
Reconcile Record	Used by agencies to save information entered on the Payroll Office Enrollees Reconcile page.

CLER Pop-up Messages

Throughout CLER, pop-up messages appear when certain actions are performed. These pop-ups notify the user of an action that must be taken and/or an error condition that must be corrected. Command buttons are used on these pop-ups to accept or cancel the message. You must click a command button in order for the pop-up to disappear and to be returned to the active page. The figure below is an example of a pop-up message (**Figure 1:4**).

Figure 1:4. Pop-up Message

CLER Search Criteria Data Entry Fields

There are certain CLER pages that are used to search for and display data records. The search criteria data entry fields displayed on these pages are completed to display records that contain data related to the search criteria entries. Also, the search criteria data entry fields on these pages may be partially completed to display a wider range of data records. For example, if you are searching for all data records that contain a payroll office ID number that begins with the number 2, type **2** in the Payroll Office ID field to display data records that contain a payroll office ID number that begins with the number 2.

Note: To display all data records for a search criteria page that has no required fields, click **[Submit]** at the bottom of the page without completing any of the fields.

CLER Drop-Down Menu Data Entry Fields

Many CLER pages have drop-down menu data entry fields (**Figure 1:5**) that allow you to select the correct entry value from a list (drop-down menu) of valid values for that field.

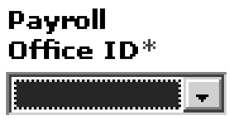


Figure 1:5. Drop-down Menu Data Entry Field

To complete a drop-down menu data entry field:

1. Click the arrow displayed next to the drop-down menu data entry field and the drop-down menu of valid values for that field is displayed.

2. Click the arrows that are displayed at the top and bottom of the drop-down menu to scroll through the menu and locate the appropriate value.

3. Click the appropriate value and that value is entered into the field.

Note: The values displayed in the drop-down menus are listed in numerical and alphabetical order. You may type the first character of a value in the field displayed next to the arrow in order to display the first value that begins with that character. For example, if you are searching for a payroll office ID number that begins with the number 2, type **2** in the field displayed next to the arrow and the first payroll office ID number from the drop-down menu that begins with the number 2 is displayed. If you click the arrow after typing 2 in the field, the payroll office ID numbers that begin with the number 2 will be displayed in numerical order.

CLER Radio Buttons

Round buttons, called radio buttons (**Figure 1:6**), are used throughout CLER. Radio buttons are used to (1) select the data that will be placed in a field, (2) select options such as a data category, and (3) specify selection criteria such as display and sort criteria for a particular search. To select a radio button, point and click the applicable radio button.

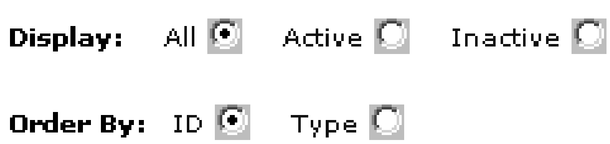


Figure 1:6. Radio Buttons

CLER Online Help

CLER Online Help provides three methods for locating information:

- ***Table of Contents***. To access the Online Help Table of Contents (**Figure 1:7**), click the question mark (?) icon on the CLER Main Menu (**Figure 1:2**). Help topics are displayed as an expandable menu in book order. As you click the Expand [+] icons, more topics are displayed. (See **Figure 1:8**.) To view the text associated with a topic, just click the topic.

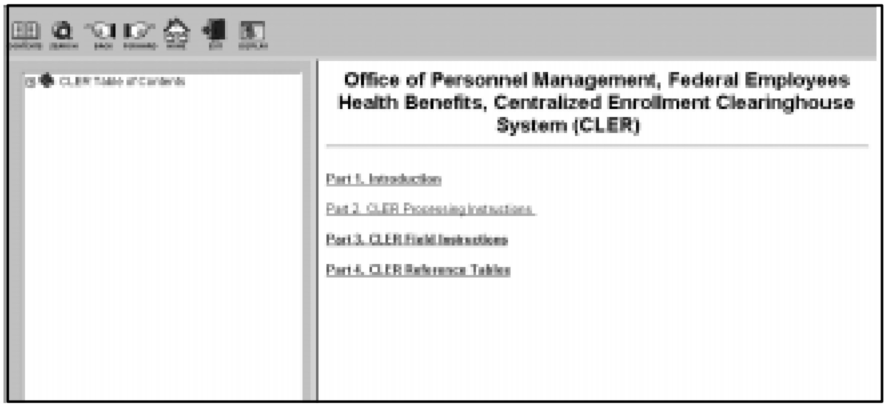


Figure 1:7. Online Help Table Of Contents

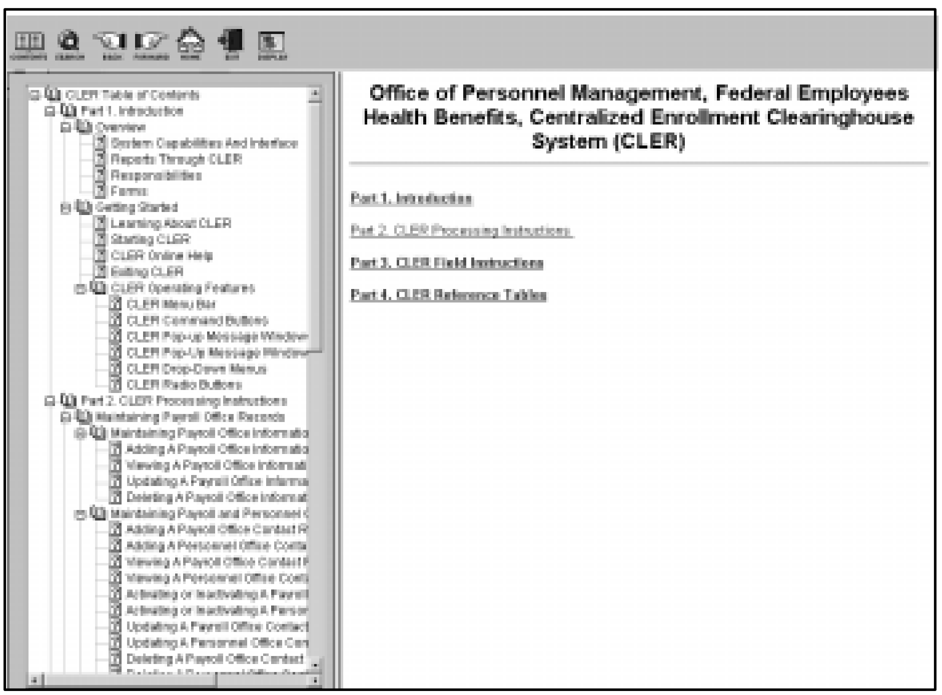


Figure 1:8. Expanded Online Help Table Of Contents

- ***Word Search***. To conduct a word search, click the Search icon in the Help menu bar. Enter a word or words in the space provided to display associated topics. Click any topic to view the associated text.
- ***Help Button on System Pages***. For field instructions/descriptions on a specific page, click the question mark icon [?] on that page.

PART 2.

CLER Processing Instructions

This part contains the following sections:

Maintaining Payroll Office Records

The Payroll Office option allows users to view and/or maintain payroll office records.

This section presents more information under the following topics:

- Viewing Payroll Office Information Records
- Maintaining Payroll And Personnel Office Contact Records
- Viewing Payroll Office Error Records
- Viewing Payroll Office Transmission Records
- Maintaining Payroll Office Enrollee Records

Viewing Payroll Office Information Records

The Info option on the Payroll Office Main Page (**Figure 2:1**) allows users to view information about each payroll office.

Note: For inquiries regarding payroll office information, agencies should contact NFC's CLER Operations and Reconciliation Unit at **504-255-3270** .

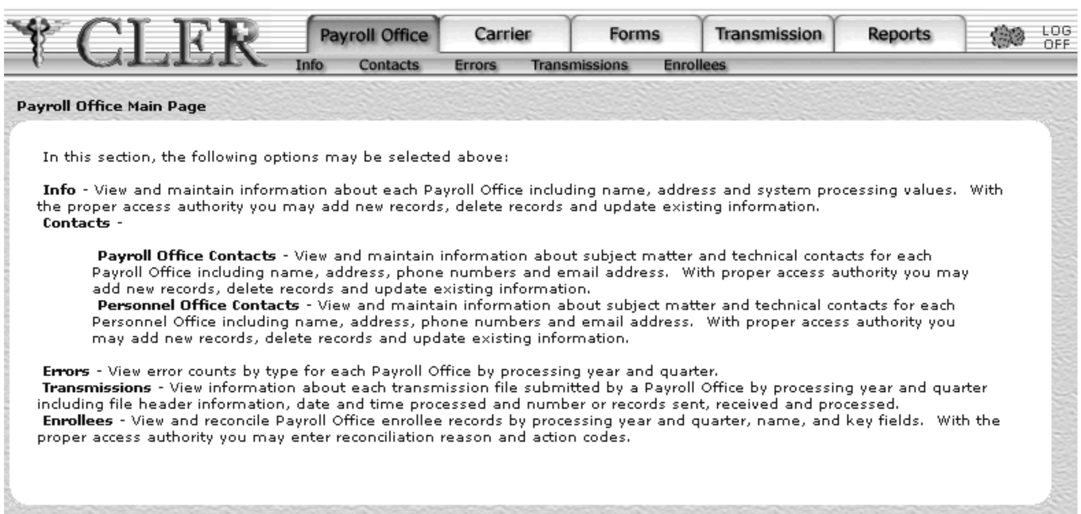


Figure 2:1. Payroll Office Main Page

To view a payroll office information record:

1. Click **[Payroll Office]** at the top of the CLER Main Menu (**Figure 1:2**). The Payroll Office Main Page (**Figure 2:1**) is displayed.

2. Click **[Info]** at the top of the Payroll Office Main Page. The Payroll Office Information page (**Figure 2:2**) is displayed.

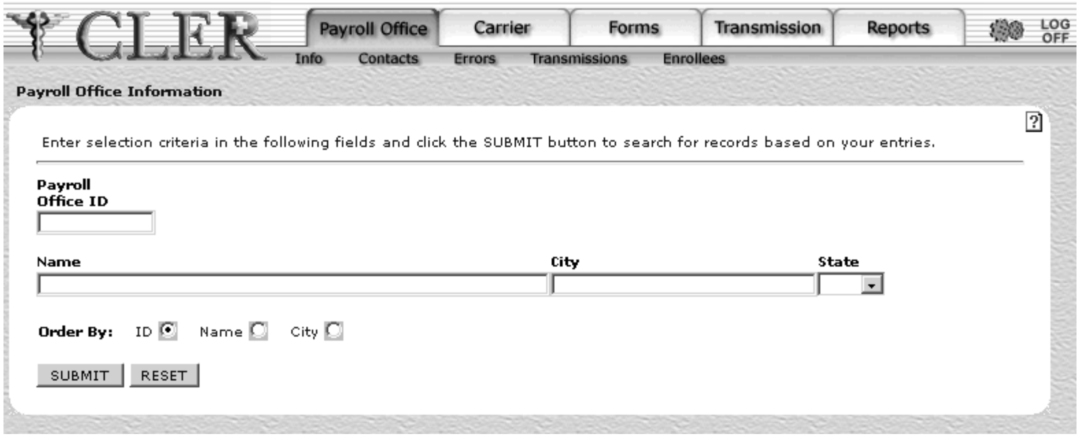


Figure 2:2. Payroll Office Information Page

3. Complete the fields on the Payroll Office Information page as indicated under [Payroll Office Information Page Field Instructions]() in **Part 3** and click **[Submit]**. The Payroll Office Information Search Results page (**Figure 2:3**) is displayed. For field descriptions, see [Payroll Office Information Search Results Page Field Descriptions]() in **Part 3**.

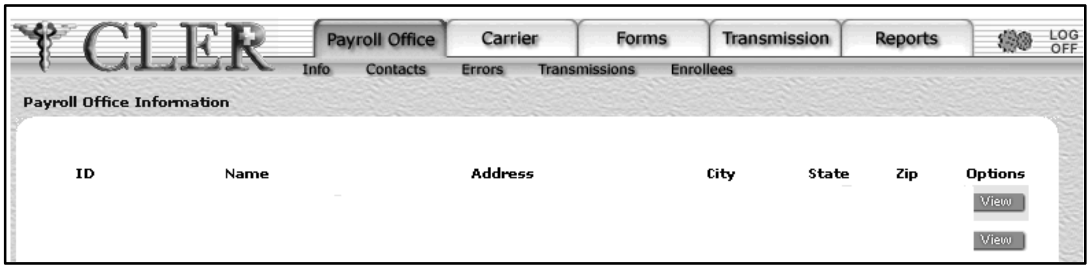


Figure 2:3. Payroll Office Information Search Results Page

4. Click **[View]** next to the applicable record. The Payroll Office Information View page (**Figure 2:4**) is displayed. For descriptions of the fields, see [Payroll Office Information View Page Field Descriptions]() in **Part 3**.

   Note: To view another record, click your browser's Back button to return to the Payroll Office Information Search Results page and click **[View]** next to the applicable record.

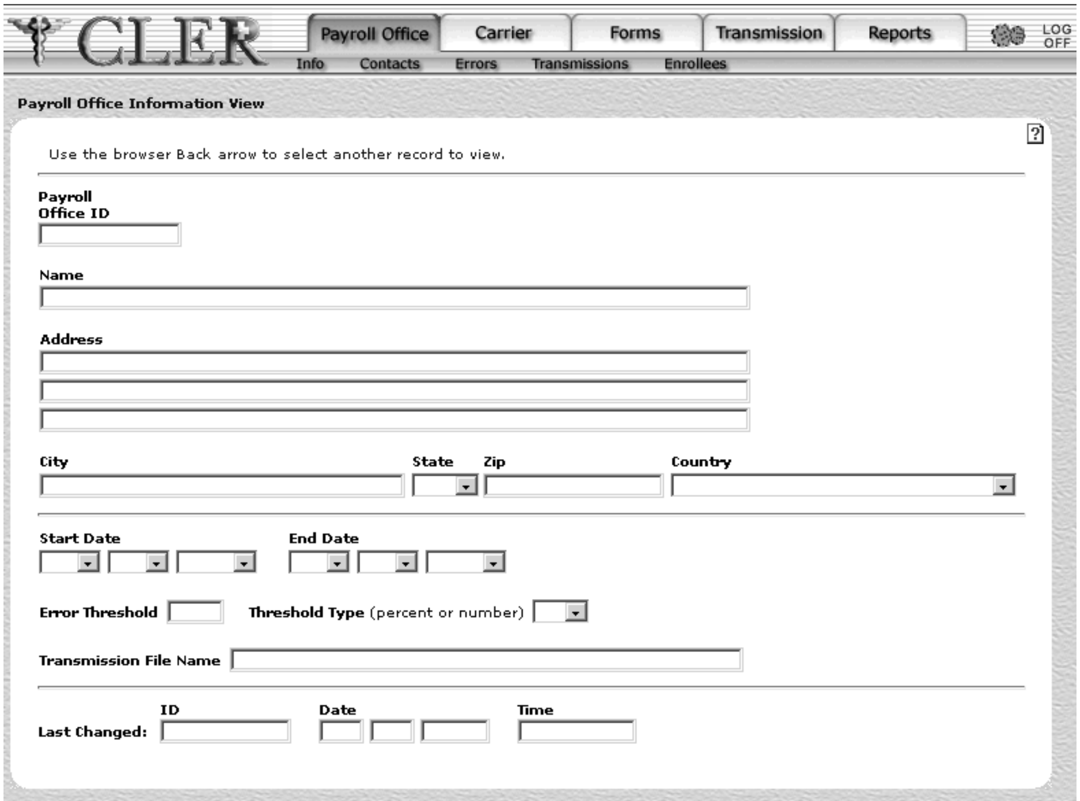


Figure 2:4. Payroll Office Information View Page

Maintaining Payroll And Personnel Office Contact Records

The Contacts option on the Payroll Office Main Page (**Figure 2:1**) allows users to view and maintain information about subject matter and technical contacts for each payroll office and personnel office. This will aid users in communicating with each other to ensure the resolution of technical concerns related to the transmissions of the enrollment data as well as ensure the resolution of reconciliation matters. With the proper access authority, new records may be added and current records may be updated.

For more information, see:

[Adding A Payroll Office Contact Record]
[Adding A Personnel Office Contact Record]
[Viewing A Payroll Office Contact Record]
[Viewing A Personnel Office Contact Record]
[Activating Or Inactivating A Payroll Office Contact Record]
[Activating Or Inactivating A Personnel Office Contact Record]
[Updating A Payroll Office Contact Record]
[Updating A Personnel Office Contact Record]

Adding A Payroll Office Contact Record

The Add function allows users to add payroll office contact records.

To add a payroll office contact record:

1. Click **[Payroll Office]** at the top of the CLER Main Menu (**Figure 1:2**). The Payroll Office Main Page (**Figure 2:1**) is displayed.

2. Click **[Contacts]** at the top of the Payroll Office Main Page. The Contacts Main Page (**Figure 2:5**) is displayed with the Payroll Office Contacts and Personnel Office Contacts options.

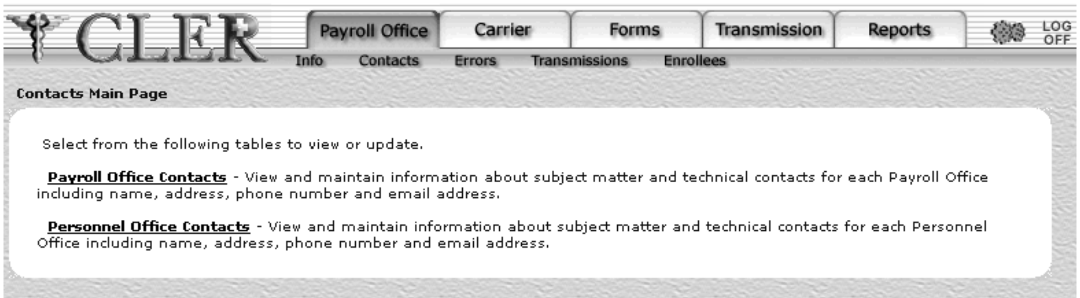


Figure 2:5. Contacts Main Page

3. Click **[Payroll Office Contacts]** on the Contacts Main Page to display the Payroll Office Contacts page (**Figure 2:6**).

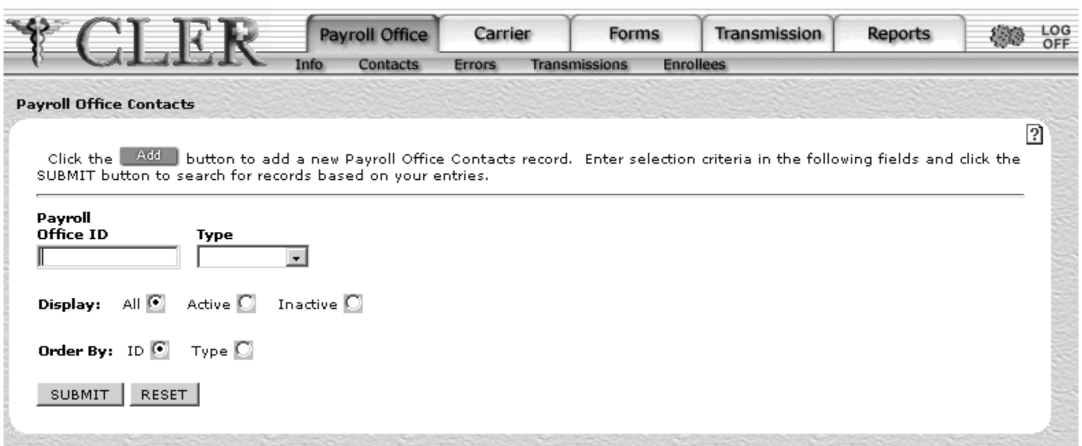


Figure 2:6. Payroll Office Contacts Page

4. Click **[Add]** on the Payroll Office Contacts page to display the Payroll Office Contacts Add page (**Figure 2:7**).

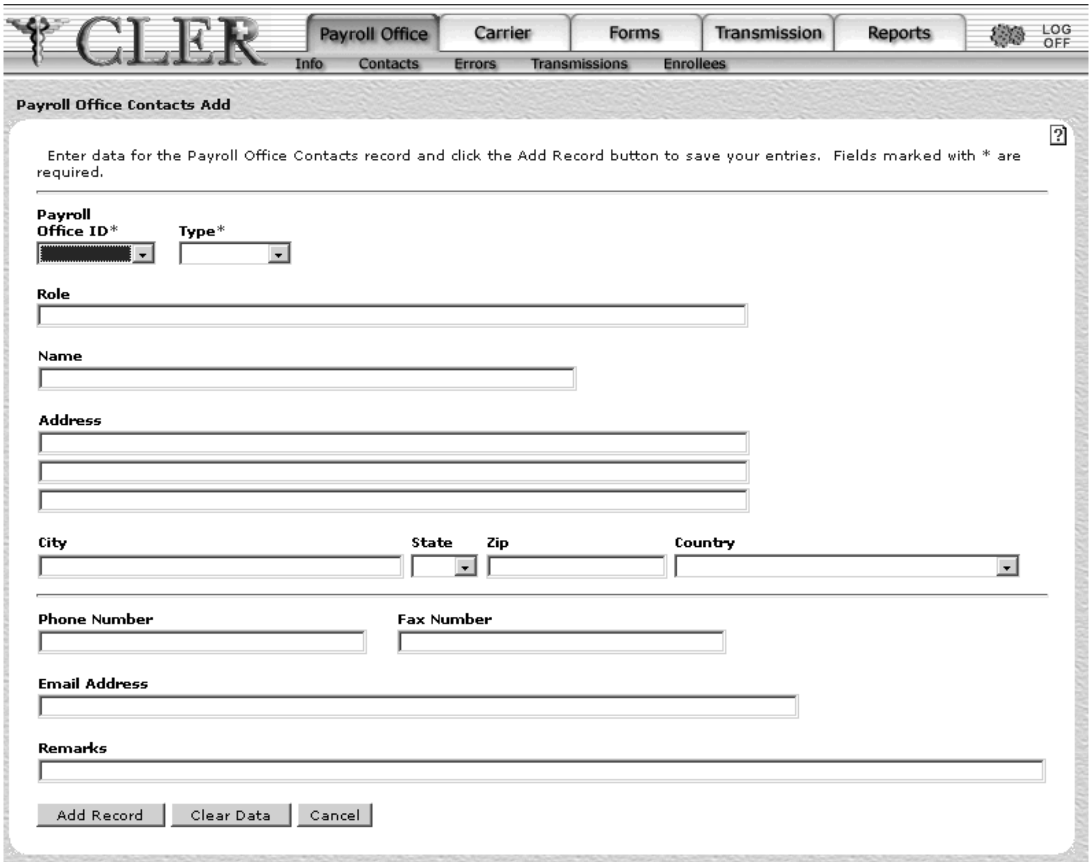


Figure 2:7. Payroll Office Contacts Add Page

5. Complete the fields on the Payroll Office Contacts Add page as indicated under **Payroll Office Contacts Add Page Field Instructions** in **Part 3**.

6. Click **[Add Record]**. If no errors occur, a pop-up message is displayed to confirm the record has been added.

7. Click **[OK]** to close the pop-up.

   Note: To add another record, click **[Cancel]** to refresh the Payroll Office Contacts Add page and complete the fields for the new record.

Adding A Personnel Office Contact Record

The Add function allows users to add personnel office contact records.

To add a personnel office contact record:

1. Click **[Payroll Office]** at the top of the CLER Main Menu (**Figure 1:2**). The Payroll Office Main Page (**Figure 2:1**) is displayed.

2. Click **[Contacts]** at the top of the Payroll Office Main Page. The Contacts Main Page (**Figure 2:5**) is displayed with the Payroll Office Contacts and Personnel Office Contacts options.

3. Click **[Personnel Office Contacts]** on the Contacts Main Page to display the Personnel Office Contacts page (**Figure 2:8**).

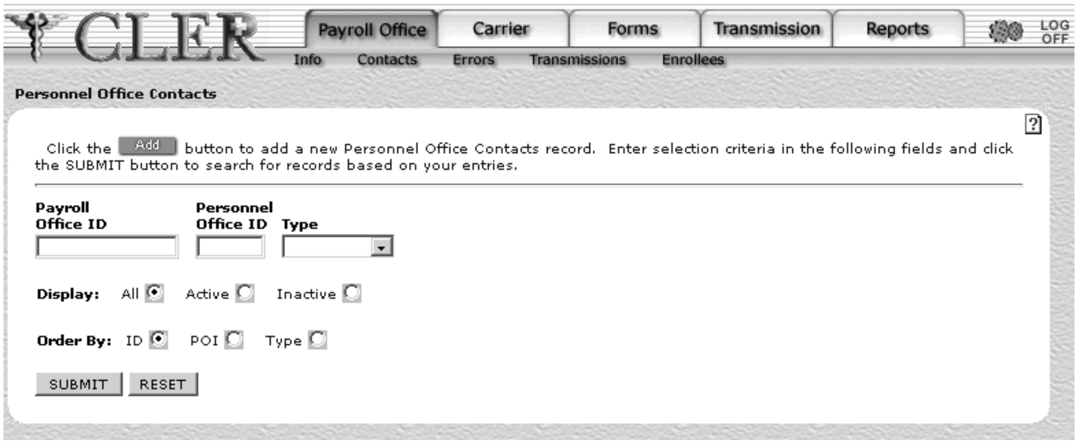


Figure 2:8. Personnel Office Contacts Page

4. Click **[Add]** on the Personnel Office Contacts page to display the Personnel Office Contacts Add page (**Figure 2:9**).

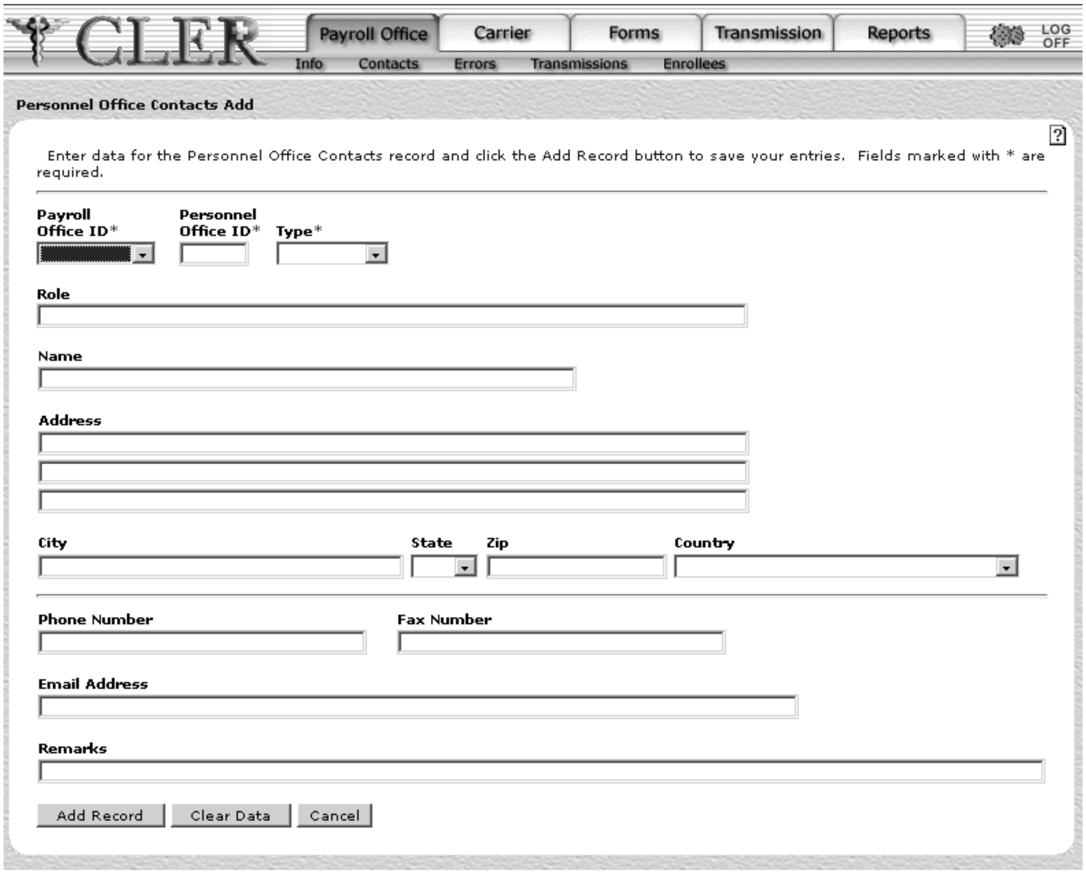


Figure 2:9. Personnel Office Contacts Add Page

5. Complete the fields on the Personnel Office Contacts Add page as indicated under **Personnel Office Contacts Add Page Field Instructions** in **Part 3**.

6. Click **[Add Record]**. If no errors occur, a pop-up message is displayed to confirm the record has been added.

7. Click **[OK]** to close the pop-up.

   Note: To add another record, click **[Cancel]** to refresh the Personnel Office Contacts Add page and complete the fields for the new record.

Viewing A Payroll Office Contact Record

The View function allows users to view payroll office contact records.

To view a payroll office contact record:

1. Click **[Payroll Office]** at the top of the CLER Main Menu (**Figure 1:2**). The Payroll Office Main Page (**Figure 2:1**) is displayed.

2. Click **[Contacts]** at the top of the Payroll Office Main Page. The Contacts Main Page (**Figure 2:5**) is displayed with the Payroll Office Contacts and Personnel Office Contacts options.

3. Click **[Payroll Office Contacts]** on the Contacts Main Page to display the Payroll Office Contacts page (**Figure 2:6**).

4. Complete the fields on the Payroll Office Contacts page as indicated under **Payroll Office Contacts Page Field Instructions** in **Part 3** and click **[Submit]**. The Payroll Office Contacts Search Results page (**Figure 2:10**) is displayed. For field descriptions, see **Payroll Office Contacts Search Results Page Field Descriptions** in **Part 3**.

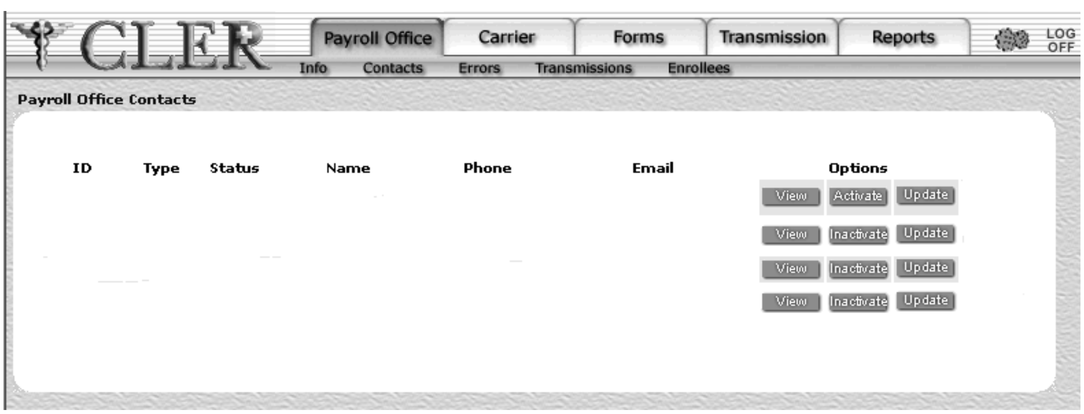


Figure 2:10. Payroll Office Contacts Search Results Page

5. Click **[View]** next to the applicable record. The Payroll Office Contacts View page (**Figure 2:11**) is displayed. For descriptions of the fields, see **Payroll Office Contacts View Page Field Descriptions** in **Part 3**.

   Note: To view another record, click your browser's Back button to return to the Payroll Office Contacts Search Results page and click **[View]** next to the applicable record.

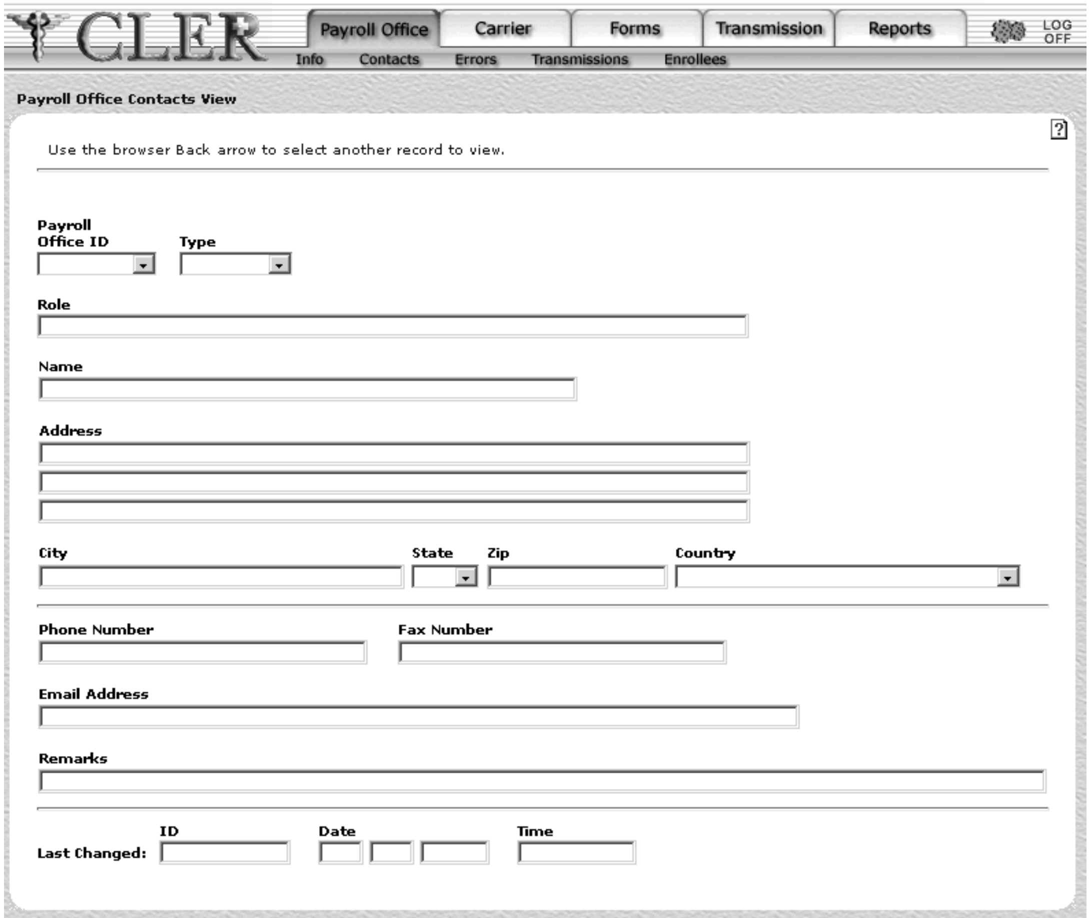


Figure 2:11. Payroll Office Contacts View Page

Viewing A Personnel Office Contact Record

The View function allows users to view personnel office contact records.

To view a personnel office contact record:

1. Click **[Payroll Office]** at the top of the CLER Main Menu (**Figure 1:2**). The Payroll Office Main Page (**Figure 2:1**) is displayed.

2. Click **[Contacts]** at the top of the Payroll Office Main Page. The Contacts Main Page (**Figure 2:5**) is displayed with the Payroll Office Contacts and Personnel Office Contacts options.

3. Click **[Personnel Office Contacts]** on the Contacts Main Page to display the Personnel Office Contacts page (**Figure 2:8**).

4. Complete the fields on the Personnel Office Contacts page as indicated under **Personnel Office Contacts Page Field Instructions** in **Part 3** and click **[Submit]**. The Personnel Office Contacts Search Results page (**Figure 2:12**) is displayed. For field descriptions, see **Personnel Office Contacts Search Results Page Field Descriptions** in **Part 3**.

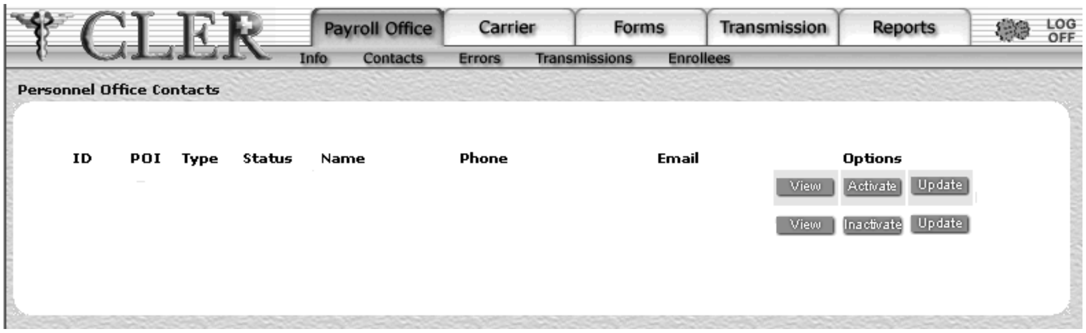


Figure 2:12. Personnel Office Contacts Search Results Page

5. Click **[View]** next to the applicable record. The Personnel Office Contacts View page (**Figure 2:13**) is displayed. For field descriptions, see **Personnel Office Contacts View Page Field Descriptions** in **Part 3**.

   Note: To view another record, click your browser's Back button to return to the Personnel Office Contacts Search Results page and click **[View]** next to the applicable record.

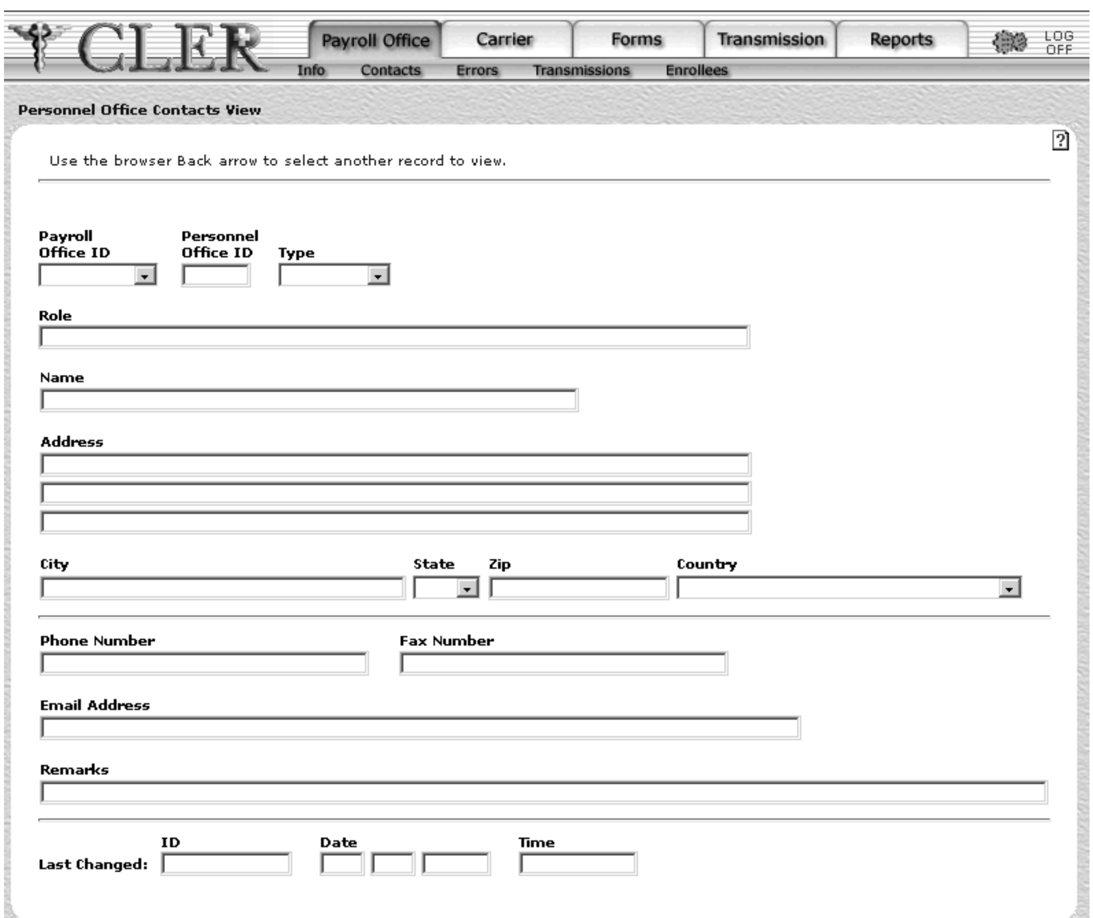


Figure 2:13. Personnel Office Contacts View Page

Activating Or Inactivating A Payroll Office Contact Record

The Activate/Inactivate function allows users to activate or inactivate payroll office contact records.

To activate or inactivate a payroll office contact record:

1. Click **[Payroll Office]** at the top of the CLER Main Menu (**Figure 1:2**). The Payroll Office Main Page (**Figure 2:1**) is displayed.
2. Click **[Contacts]** at the top of the Payroll Office Main Page. The Contacts Main Page (**Figure 2:5**) is displayed with the Payroll Office Contacts and Personnel Office Contacts options.
3. Click **[Payroll Office Contacts]** on the Contacts Main Page to display the Payroll Office Contacts page (**Figure 2:6**).
4. Complete the fields on the Payroll Office Contacts page as indicated under **Payroll Office Contacts Page Field Instructions** in **Part 3** and click **[Submit]**. The Payroll Office Contacts Search Results page (**Figure 2:10**) is displayed. For field descriptions, see **Payroll Office Contacts Search Results Page Field Descriptions** in **Part 3**.

   Note: The Inactivate button is displayed next to records that have been activated, and the Activate button is displayed next to records that have been inactivated.
5. Click **[Activate]** to activate an inactivated record. A pop-up message is displayed to confirm the record has been activated.
6. Click **[OK]** to close the pop-up.
7. Click **[Inactivate]** to inactivate an activated record. A pop-up message is displayed to confirm the record has been inactivated.
8. Click **[OK]** to close the pop-up.

Activating Or Inactivating A Personnel Office Contact Record

The Activate/Inactivate function allows users to activate and inactivate personnel office contact records.

To activate or inactivate a personnel office contact record:

1. Click **[Payroll Office]** at the top of the CLER Main Menu (**Figure 1:2**). The Payroll Office Main Page (**Figure 2:1**) is displayed.
2. Click **[Contacts]** at the top of the Payroll Office Main Page. The Contacts Main Page (**Figure 2:5**) is displayed with the Payroll Office Contacts and Personnel Office Contacts options.
3. Click **[Personnel Office Contacts]** on the Contacts Main Page to display the Personnel Office Contacts page (**Figure 2:8**).
4. Complete the fields on the Personnel Office Contacts page as indicated under **Personnel Office Contacts Page Field Instructions** in **Part 3** and click **[Submit]**. The

Personnel Office Contacts Search Results page (**Figure 2:12**) is displayed. For field descriptions, see **Personnel Office Contacts Search Results Page Field Descriptions** in **Part 3**.

Note: The Inactivate button is displayed next to records that have been activated, and the Activate button is displayed next to records that have been inactivated.

5. Click **[Activate]** to activate an inactivated record. A pop-up message is displayed to confirm the record has been activated.

6. Click **[OK]** to close the pop-up.

7. Click **[Inactivate]** to inactivate an activated record. A pop-up message is displayed to confirm the record has been inactivated.

8. Click **[OK]** to close the pop-up.

Updating A Payroll Office Contact Record

The Update function allows users to update payroll office contact records.

To update a payroll office contact record:

1. Click **[Payroll Office]** at the top of the CLER Main Menu (**Figure 1:2**). The Payroll Office Main Page (**Figure 2:1**) is displayed.

2. Click **[Contacts]** at the top of the Payroll Office Main Page. The Contacts Main Page (**Figure 2:5**) is displayed with the Payroll Office Contacts and Personnel Office Contacts options.

3. Click **[Payroll Office Contacts]** on the Contacts Main Page to display the Payroll Office Contacts page (**Figure 2:6**).

4. Complete the fields on the Payroll Office Contacts page as indicated under **Payroll Office Contacts Page Field Instructions** in **Part 3** and click **[Submit]**. The Payroll Office Contacts Search Results page (**Figure 2:10**) is displayed. For field descriptions, see **Payroll Office Contacts Search Results Page Field Descriptions** in **Part 3**.

5. Click **[Update]** next to the applicable record. The Payroll Office Contacts Update page (**Figure 2:14**) is displayed.

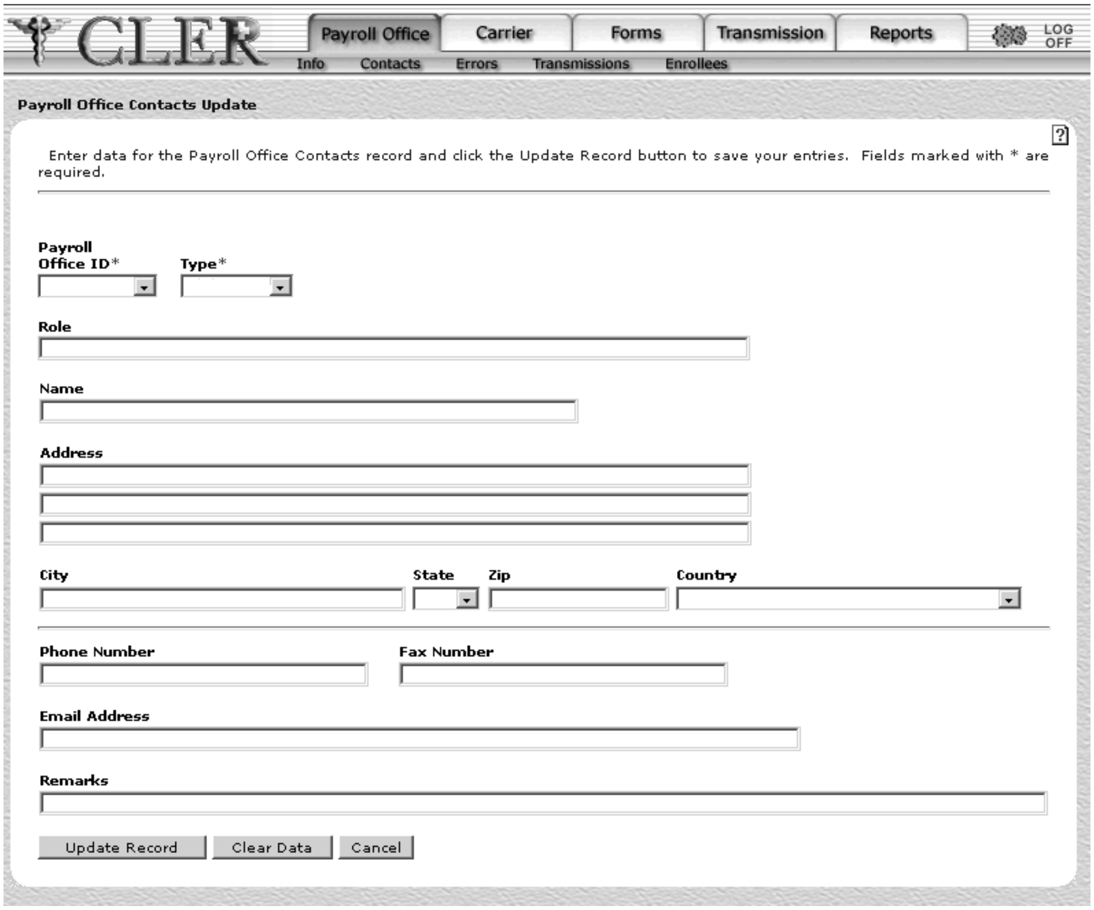


Figure 2:14. Payroll Office Contacts Update Page

6. Complete the applicable fields on the Payroll Office Contacts Update page as indicated under **Payroll Office Contacts Update Page Field Instructions** in **Part 3**.
7. Click **[Update Record]**. If no errors occur, a pop-up message is displayed to confirm the record has been updated.
8. Click **[OK]** to close the pop-up.

   Note: To update another record, click **[Cancel]** to return to the Payroll Office Contacts Search Results page and click **[Update]** next to the applicable record.

Updating A Personnel Office Contact Record

The Update function allows users to update personnel office contact records.

To update a personnel office contact record:

1. Click **[Payroll Office]** at the top of the CLER Main Menu (**Figure 1:2**). The Payroll Office Main Page (**Figure 2:1**) is displayed.
2. Click **[Contacts]** at the top of the Payroll Office Main Page. The Contacts Main Page (**Figure 2:5**) is displayed with the Payroll Office Contacts and Personnel Office Contacts options.

3. Click **[Personnel Office Contacts]** on the Contacts Main Page to display the Personnel Office Contacts page (**Figure 2:8**).

4. Complete the fields on the Personnel Office Contacts page as indicated under **Personnel Office Contacts Page Field Instructions** in **Part 3** and click **[Submit]**. The Personnel Office Contacts Search Results page (**Figure 2:12**) is displayed. For field descriptions, see **Personnel Office Contacts Search Results Page Field Descriptions** in **Part 3**.

5. Click **[Update]** next to the applicable record. The Personnel Office Contacts Update page (**Figure 2:15**) is displayed.

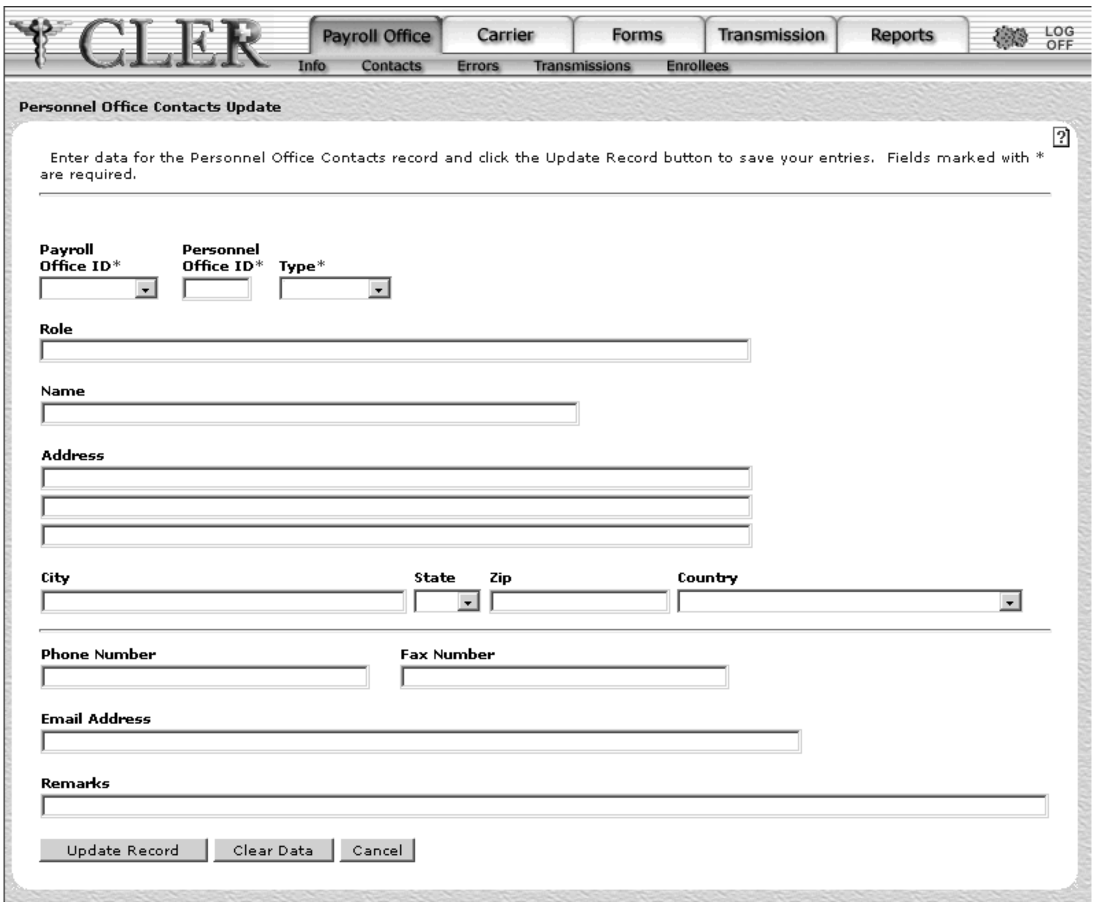


Figure 2:15. Personnel Office Contacts Update Page

6. Complete the applicable fields on the Personnel Office Contacts Update page as indicated under **Personnel Office Contacts Update Page Field Instructions** in **Part 3**.

7. Click **[Update Record]**. If no errors occur, a pop-up message is displayed to confirm the record has been updated.

8. Click **[OK]** to close the pop-up.

   Note: To update another record, click **[Cancel]** to return to the Personnel Office Contacts Search Results page and click **[Update]** next to the applicable record.

Viewing Payroll Office Error Records

The Errors option on the Payroll Office Main Page (**Figure 2:1**) allows users with the proper access authority to view error counts by type for each payroll office by processing year and quarter.

To view a payroll office error record:

1. Click **[Payroll Office]** at the top of the CLER Main Menu (**Figure 1:2**). The Payroll Office Main Page (**Figure 2:1**) is displayed.

2. Click **[Errors]** at the top of the Payroll Office Main Page. The Payroll Office Errors page (**Figure 2:16**) is displayed.

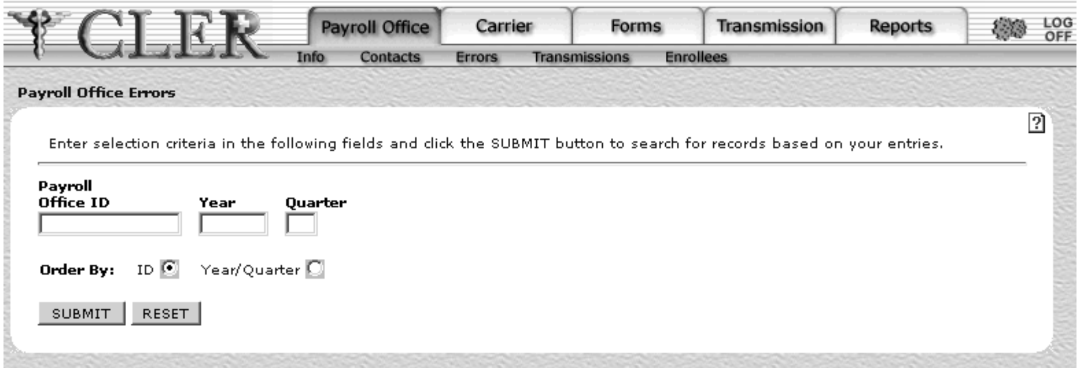


Figure 2:16. Payroll Office Errors Page

3. Complete the fields on the Payroll Office Errors page as indicated under **Payroll Office Errors Page Field Instructions** in **Part 3** and click **[Submit]**. The Payroll Office Errors Search Results page (**Figure 2:17**) is displayed. For field descriptions, see **Payroll Office Errors Search Results Page Field Descriptions** in **Part 3**.

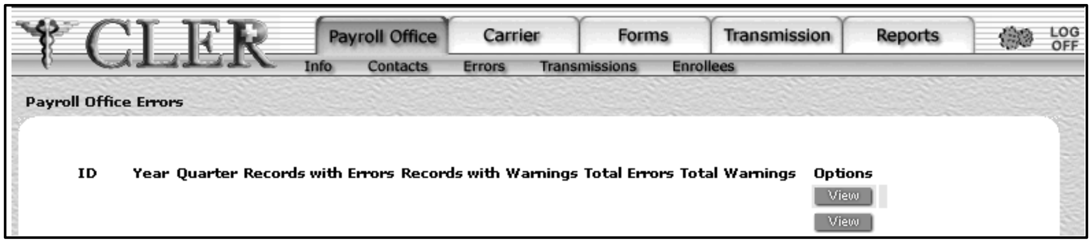


Figure 2:17. Payroll Office Errors Search Results Page

4. Click **[View]** next to the applicable record. The Payroll Office Errors View page (**Figure 2:18**) is displayed. For field descriptions, see **Payroll Office Errors View Page Field Descriptions** in **Part 3**.

   Note: To view another record, click your browser's Back button to return to the Payroll Office Errors Search Results page and click **[View]** next to the applicable record.

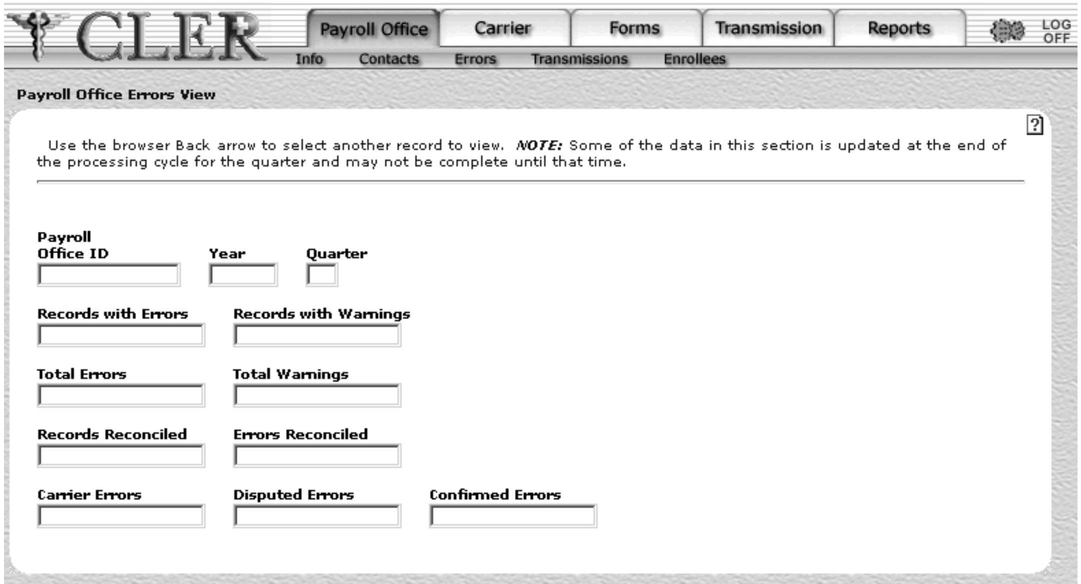


Figure 2:18. Payroll Office Errors View Page

Viewing Payroll Office Transmission Records

The Transmissions option on the Payroll Office Main Page (**Figure 2:1**) allows users to view information about each transmission file submitted by a payroll office by the year and quarter the file was processed. This information includes file header information; date and time processed; and number of records sent, received, and processed.

To view a payroll office transmission record:

1. Click **[Payroll Office]** at the top of the CLER Main Menu (**Figure 1:2**). The Payroll Office Main Page (**Figure 2:1**) is displayed.

2. Click **[Transmissions]** at the top of the Payroll Office Main Page. The Payroll Office Transmissions page (**Figure 2:19**) is displayed.

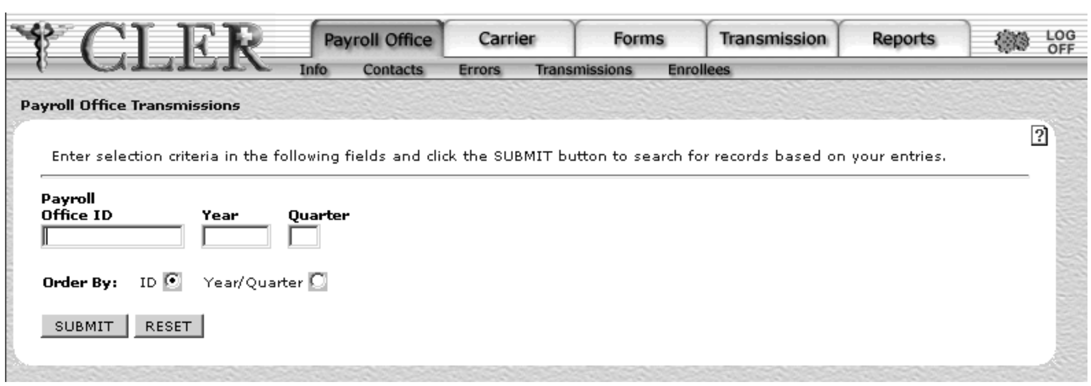


Figure 2:19. Payroll Office Transmissions Page

3. Complete the fields on the Payroll Office Transmissions page as indicated under Payroll Office Transmissions Page Field Instructions in **Part 3** and click **[Submit]**.

The Payroll Office Transmissions Search Results page (**Figure 2:20**) is displayed. For field descriptions, see **Payroll Office Transmissions Search Results Page Field Descriptions** in **Part 3**.

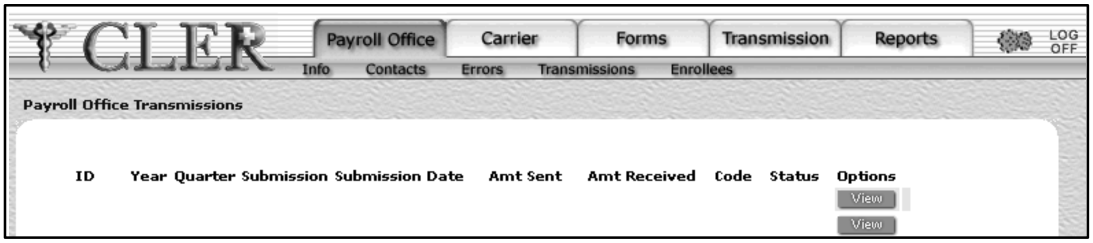


Figure 2:20. Payroll Office Transmissions Search Results Page

4. Click **[View]** next to the applicable record. The Payroll Office Transmissions View page (**Figure 2:21**) is displayed. For field descriptions, see **Payroll Office Transmissions View Page Field Descriptions** in **Part 3**.

   Note: To view another record, click your browser's Back button to return to the Payroll Office Transmissions Search Results page and click **[View]** next to the applicable record.

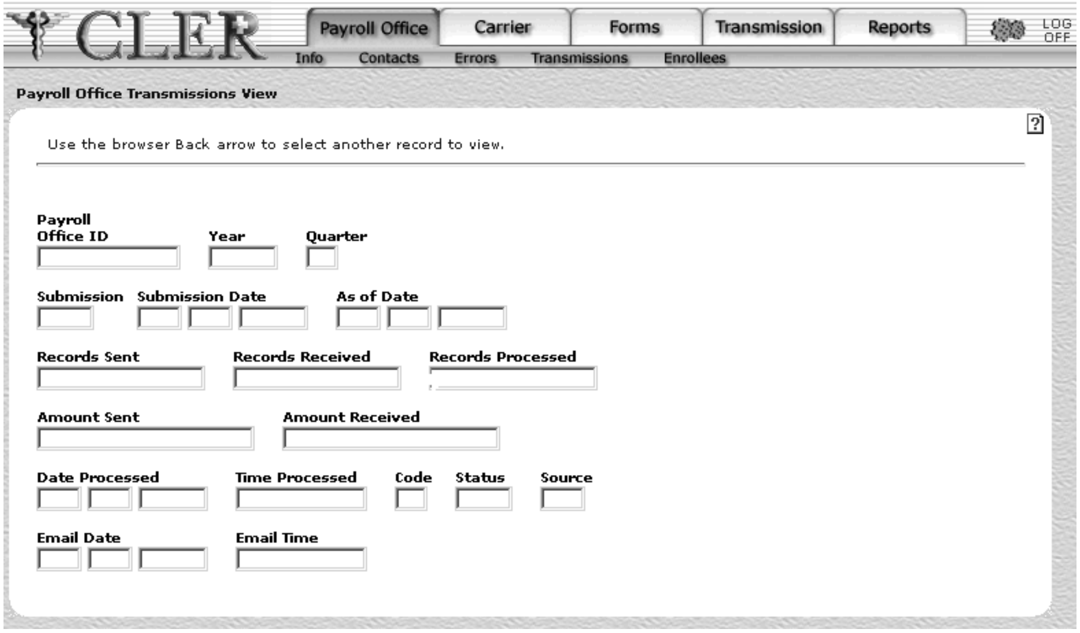


Figure 2:21. Payroll Office Transmissions View Page

Maintaining Payroll Office Enrollee Records

The Enrollees option on the Payroll Office Main Page (**Figure 2:1**) allows users to view and/or reconcile payroll office enrollee records. With the proper access authority, reconciliation reason and reconciliation action codes may be entered.

For more information, see:

[Viewing A Payroll Office Enrollee Record]
[Viewing A Matching Carrier Enrollee Record Or Duplicate Payroll Office Enrollee Record]
[Reconciling A Payroll Office Enrollee Record]

Viewing A Payroll Office Enrollee Record

The View function allows users to view payroll office enrollee records.

To view a payroll office enrollee record:

1. Click **[Payroll Office]** at the top of the CLER Main Menu (**Figure 1:2**). The Payroll Office Main Page (**Figure 2:1**) is displayed.

2. Click **[Enrollees]** at the top of the Payroll Office Main Page. The Payroll Office Enrollees page (**Figure 2:22**) is displayed.

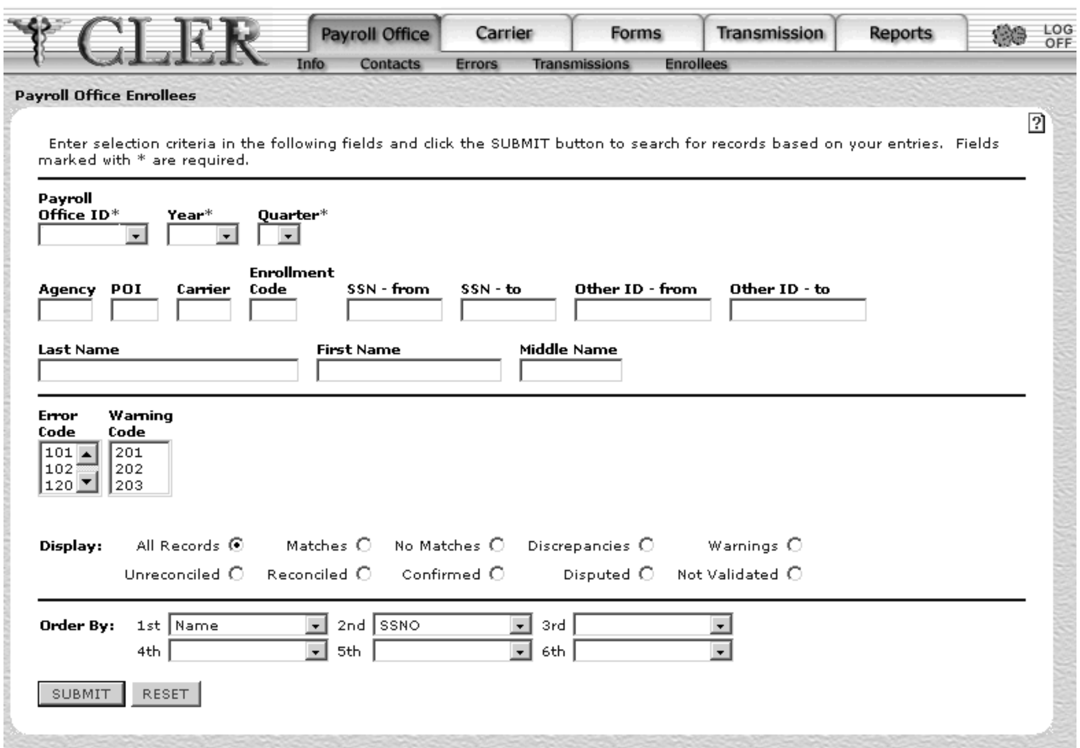


Figure 2:22. Payroll Office Enrollees Page

3. Complete the fields on the Payroll Office Enrollees page as indicated under [Payroll Office Enrollees Page Field Instructions] in **Part 3** and click **[Submit]**. The Payroll Office Enrollees Search Results page (**Figure 2:23**) is displayed. For field descriptions, see [Payroll Office Enrollees Search Results Page Field Descriptions] in **Part 3**.

   Note: The Payroll Office Enrollees Search Results (Other ID) page (**Figure 2:24**) is displayed when **`24900002`**, **`24900003`**, or **`160099XX`** is entered in the Payroll Office ID field on the Payroll Office Enrollees page.

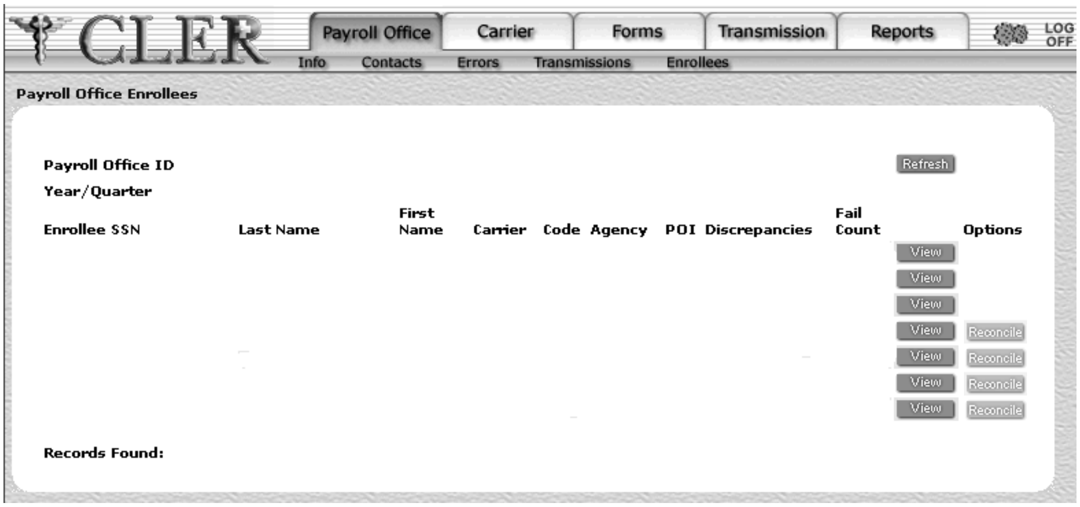


Figure 2:23. Payroll Office Enrollees Search Results Page

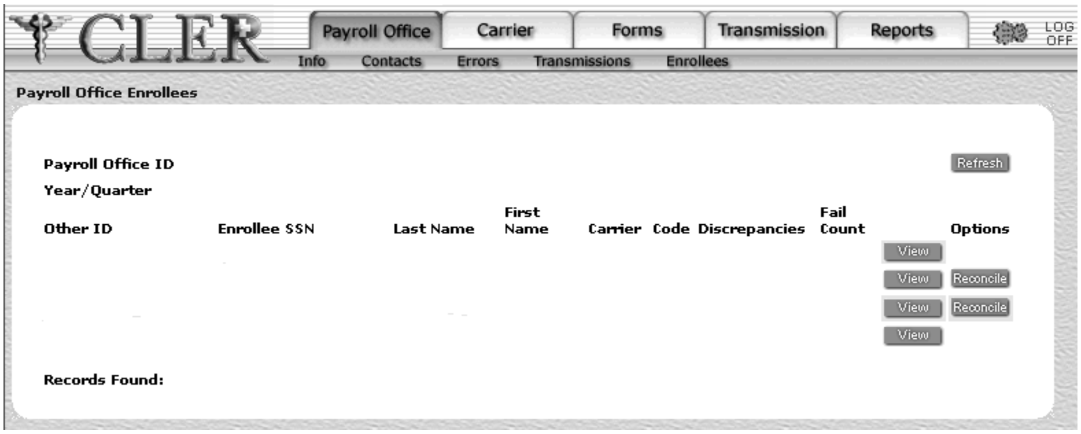


Figure 2:24. Payroll Office Enrollees Search Results (Other ID) Page

4. Click **[View]** next to the applicable record. The Payroll Office Enrollees View page (**Figure 2:25**) is displayed. For field descriptions, see **Payroll Office Enrollees View Page Field Descriptions** in **Part 3**.

   Note: To view another enrollee record, click your browser's Back button to return to the Payroll Office Enrollees Search Results page and click **[View]** next to the applicable record.

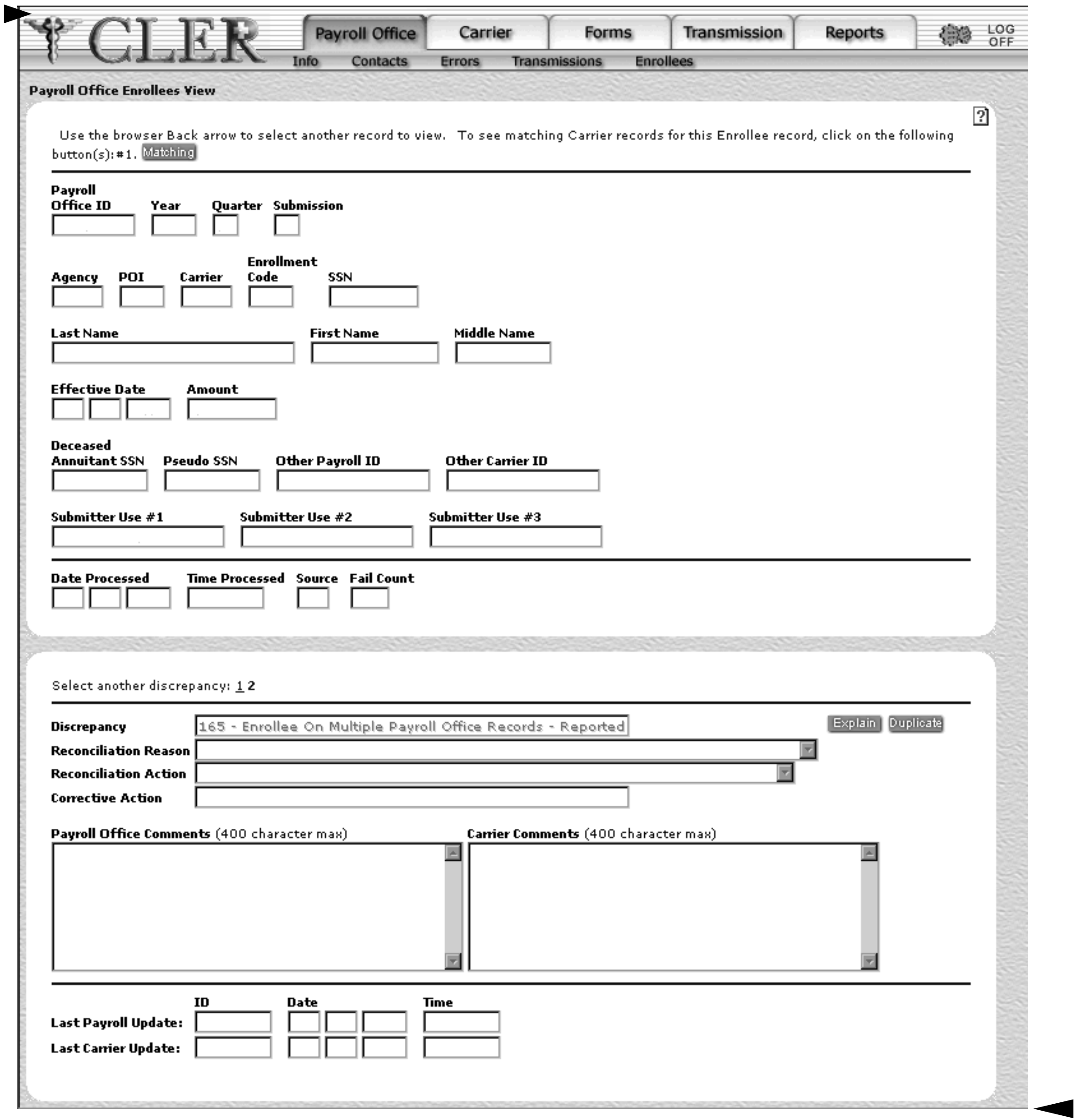


Figure 2:25. Payroll Office Enrollees View Page

Viewing A Matching Carrier Enrollee Record Or Duplicate Payroll Office Enrollee Record

The Matching button at the top of the Payroll Office Enrollees View page (**Figure 2:25**) allows users to view certain enrollee data from a carrier enrollee record that matches a selected payroll office enrollee record. Since there may be more than one matching carrier enrollee record, a Matching button is displayed for each matching record. The Duplicate button next to the Discrepancy field on the Payroll Office Enrollees View page allows users to view data from another payroll office enrollee record that was submitted for the same enrollee. The Matching and Duplicate functions facilitate the reconciliation process.

To view matching carrier enrollee records or duplicate payroll office enrollee records:

1. Click **[Payroll Office]** at the top of the CLER Main Menu (**Figure 1:2**). The Payroll Office Main Page (**Figure 2:1**) is displayed.

2. Click **[Enrollees]** at the top of the Payroll Office Main Page. The Payroll Office Enrollees page (**Figure 2:22**) is displayed.

3. Complete the fields on the Payroll Office Enrollees page as indicated under **Payroll Office Enrollees Page Field Instructions** in **Part 3** and click **[Submit]**. The Payroll Office Enrollees Search Results page (**Figure 2:23**) is displayed. For field descriptions, see **Payroll Office Enrollees Search Results Page Field Descriptions** in **Part 3**.

   Note: The Payroll Office Enrollees Search Results (Other ID) page (**Figure 2:24**) is displayed when **24900002**, **24900003**, or **160099XX** is entered in the Payroll Office ID field on the Payroll Office Enrollees page.

4. Click **[View]** next to the applicable record. The Payroll Office Enrollees View page (**Figure 2:25**) is displayed. For field descriptions, see **Payroll Office Enrollees View Page Field Descriptions** in **Part 3**.

5. Click **[Matching]** at the top of the Payroll Office Enrollees View page. The Carrier Enrollees View page (**Figure 2:26**) containing the data from the matching carrier enrollee record is displayed. The data displayed on the Carrier Enrollees View page is limited to the payroll office identification number, carrier identifier, enrollment effective date, and the year and quarter the carrier enrollee record was submitted. For field descriptions, see **Carrier Enrollees View Page Field Descriptions** in **Part 3**.

   Note: If the payroll office enrollee record data displayed on the Payroll Office Enrollees View page (**Figure 2:25**) is matched with the data from another payroll office enrollee record, **Discrepancy Code 165** or **167** is displayed in the Discrepancy field. When these discrepancies occur, the Duplicate button is displayed next to the Discrepancy field. Click **[Duplicate]** to display the Payroll Office Enrollees View page (**Figure 2:27**) containing the data from the matching payroll office enrollee record. The data displayed on the Payroll Office Enrollees View page is limited to the payroll office identification number, carrier identifier, enrollment effective date, and the year and quarter the payroll office enrollee record was submitted. For field descriptions, see **Payroll Office Enrollees View Page Field Descriptions** in **Part 3**.

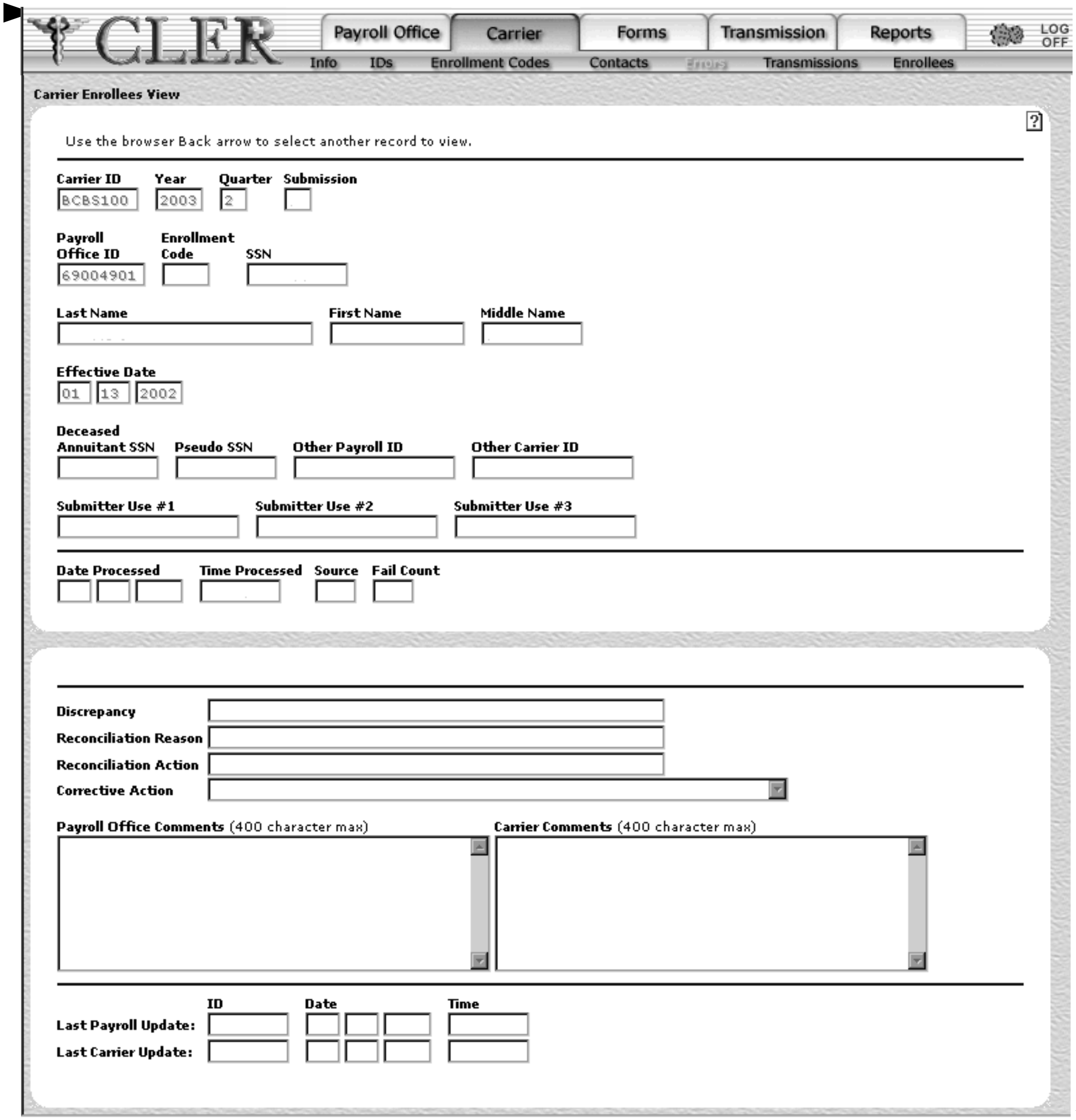


Figure 2:26. Carrier Enrollees View Page

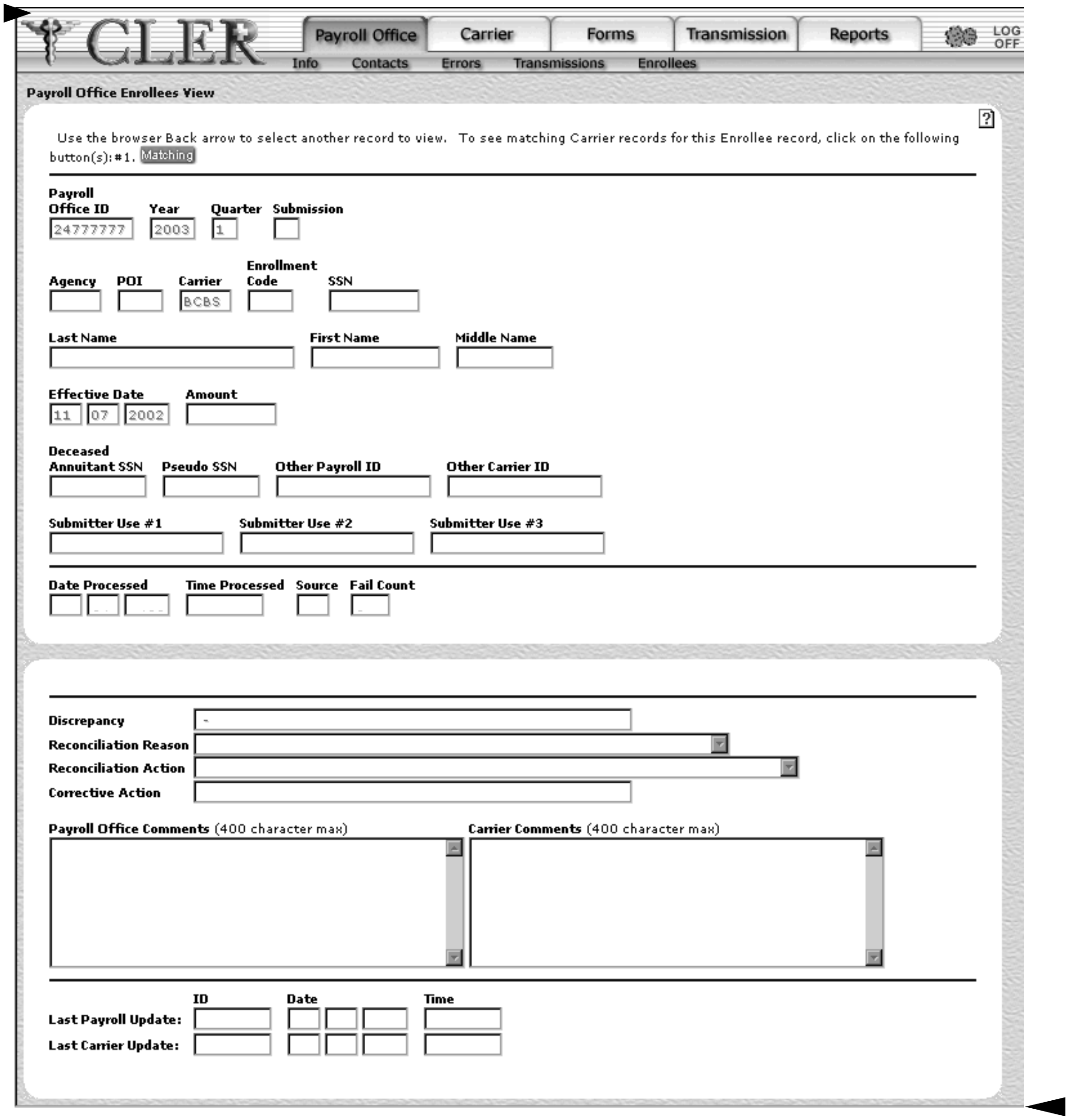


Figure 2:27. Payroll Office Enrollees View Page

Reconciling A Payroll Office Enrollee Record

The Reconcile function allows users to reconcile payroll office enrollee records.

To reconcile a payroll office enrollee record:

1. Click **[Payroll Office]** at the top of the CLER Main Menu (**Figure 1:2**). The Payroll Office Main Page (**Figure 2:1**) is displayed.

2. Click **[Enrollees]** at the top of the Payroll Office Main Page. The Payroll Office Enrollees page (**Figure 2:22**) is displayed.

3. Complete the fields on the Payroll Office Enrollees page as indicated under **Payroll Office Enrollees Page Field Instructions** in **Part 3** and click **[Submit]**. The Payroll

Office Enrollees Search Results page (**Figure 2:23**) is displayed. For field descriptions, see **Payroll Office Enrollees Search Results Page Field Descriptions** in **Part 3**.

4. Click **[Reconcile]** next to the applicable record. The Payroll Office Enrollees Reconcile page (**Figure 2:28**) is displayed.

   Note: The **[Reconcile]** button on the Payroll Office Enrollees Search Results page is only displayed next to records with discrepancies.

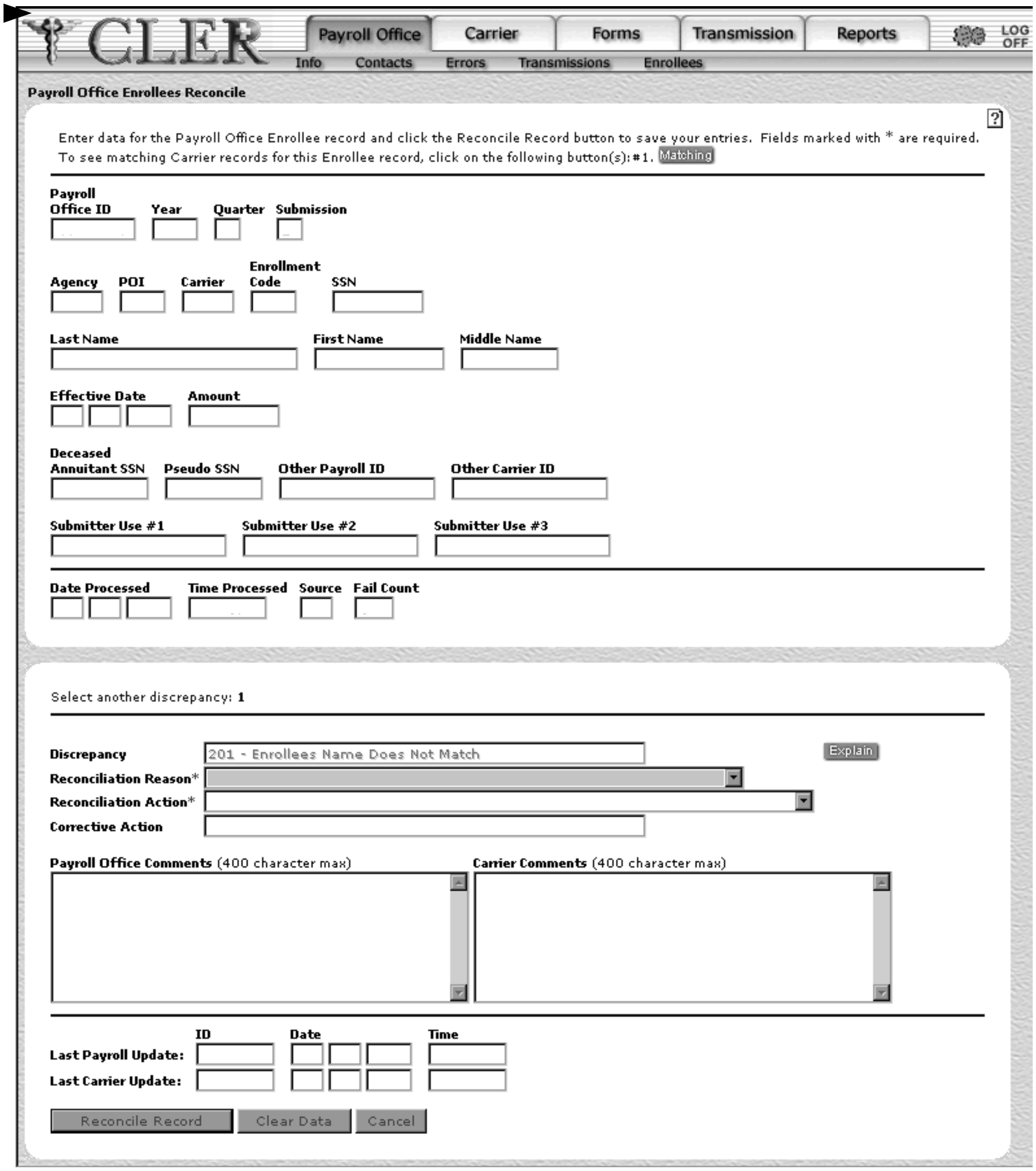


Figure 2:28. Payroll Office Enrollees Reconcile Page

5. Complete the fields on the Payroll Office Enrollees Reconcile page as indicated under **Payroll Office Enrollees Reconcile Page Field Instructions** in **Part 3.**

   Note: To view matching carrier records for this enrollee record, click **[Matching]** at the top of the page.

6. Click **[Reconcile Record]**. If no errors occur, a pop-up message is displayed to confirm the record has been reconciled.

7. Click **[OK]** to close the pop-up.

Note: To reconcile another record, click **[Cancel]** to return to the Payroll Office Enrollees Search Results page and click **[Reconcile]** next to the applicable record.

Viewing Carrier Records

The Carrier option allows users to view information about each carrier office.

For more information, see:

[Viewing Carrier Information Records](#)

[Viewing Carrier ID Records](#)

[Viewing Carrier Enrollment Code Records](#)

[Viewing Carrier And Carrier Plan Contact Records](#)

[Viewing Carrier Transmission Records](#)

[Maintaining Carrier Enrollee Records Marked With Discrepancy Code 160](#)

Viewing Carrier Information Records

The Info option on the Carrier Main Page (**Figure 2:29**) allows users to view information about each carrier office.

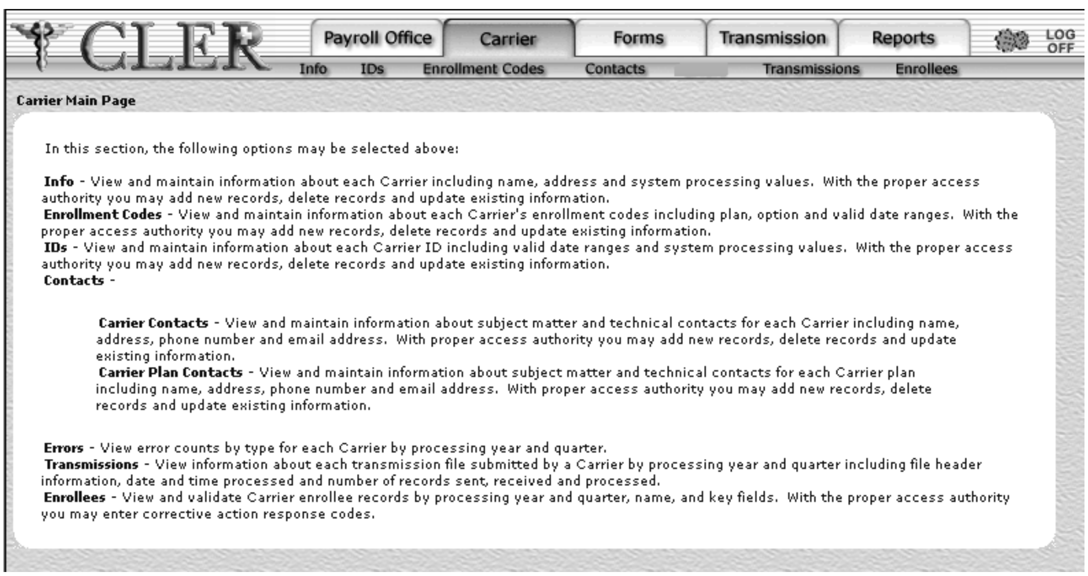


Figure 2:29. Carrier Main Page

To view a carrier information record:

1. Click **[Carrier]** at the top of the CLER Main Menu (**Figure 1:2**). The Carrier Main Page (**Figure 2:29**) is displayed.

2. Click **[Info]** at the top of the Carrier Main Page. The Carrier Information page (**Figure 2:30**) is displayed.

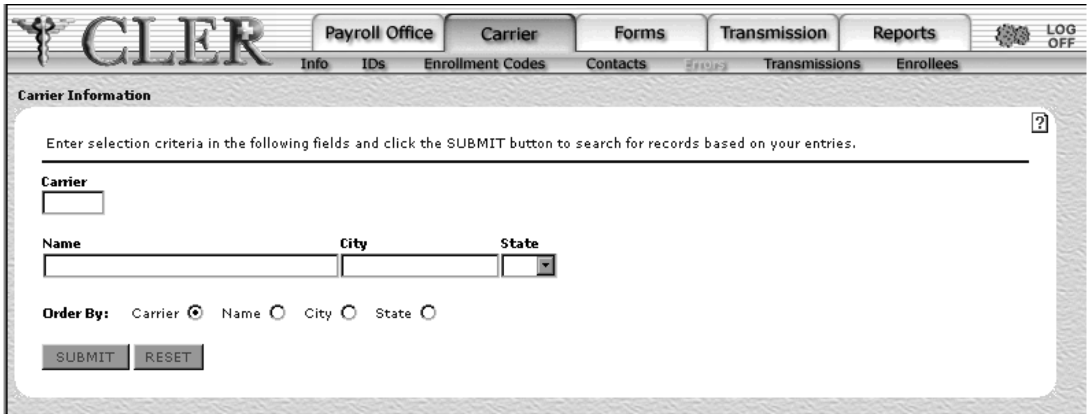


Figure 2:30. Carrier Information Page

3. Complete the fields on the Carrier Information page as indicated under **[Carrier Information Page Field Instructions]** in **Part 3** and click **[Submit]**. The Carrier Information Search Results page (**Figure 2:31**) is displayed. For field descriptions, see **[Carrier Information Search Results Page Field Descriptions]** in **Part 3**.

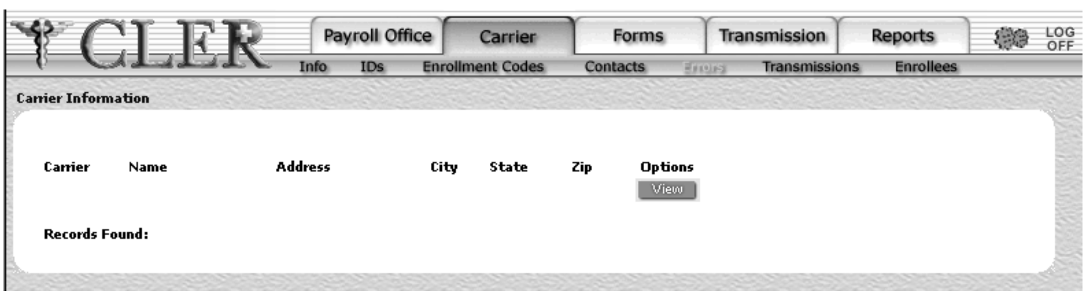


Figure 2:31. Carrier Information Search Results Page

4. Click **[View]** next to the applicable record. The Carrier Information View page (**Figure 2:32**) is displayed. For field descriptions, see **[Carrier Information View Page Field Descriptions]** in **Part 3**.

   Note: To view another record, click your browser's Back button to return to the Carrier Information Search Results page and click **[View]** next to the applicable record.

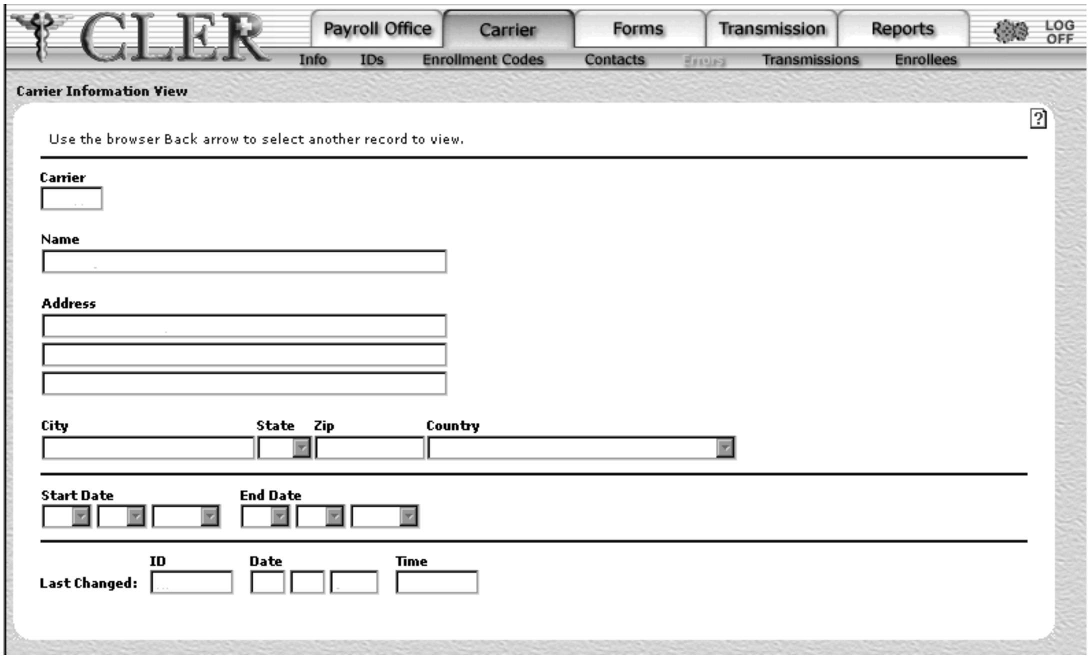


Figure 2:32. Carrier Information View Page

Viewing Carrier ID Records

The IDs option on the Carrier Main Page (**Figure 2:29**) allows users to view information about each carrier identification number. NFC's CLER Operations and Reconciliation Unit personnel assign a number for each carrier transmitting location.

To view a carrier ID record:

1. Click **[Carrier]** at the top of the CLER Main Menu (**Figure 1:2**). The Carrier Main Page (**Figure 2:29**) is displayed.

2. Click **[IDs]** at the top of the Carrier Main Page. The Carrier Identifiers page (**Figure 2:33**) is displayed.

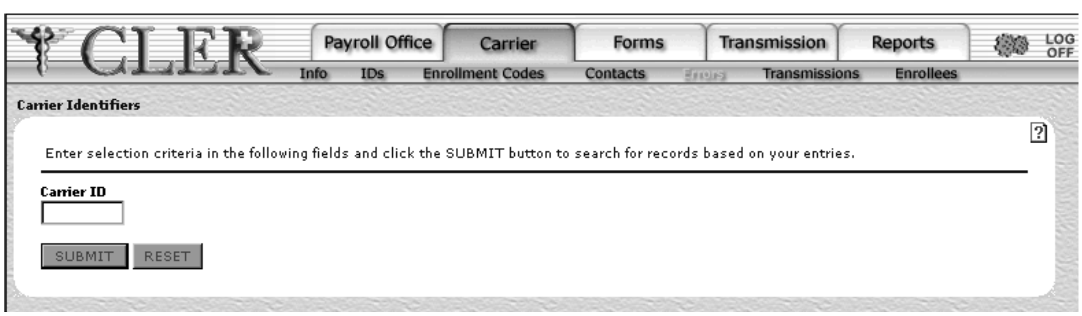


Figure 2:33. Carrier Identifiers Page

3. Complete the fields on the Carrier Identifiers page as indicated under **Carrier Identifiers Page Field Instructions** in **Part 3** and click **[Submit].** The Carrier Identifiers

Search Results page (**Figure 2:34**) is displayed. For field descriptions, see **Carrier Identifiers Search Results Page Field Descriptions** in **Part 3**.

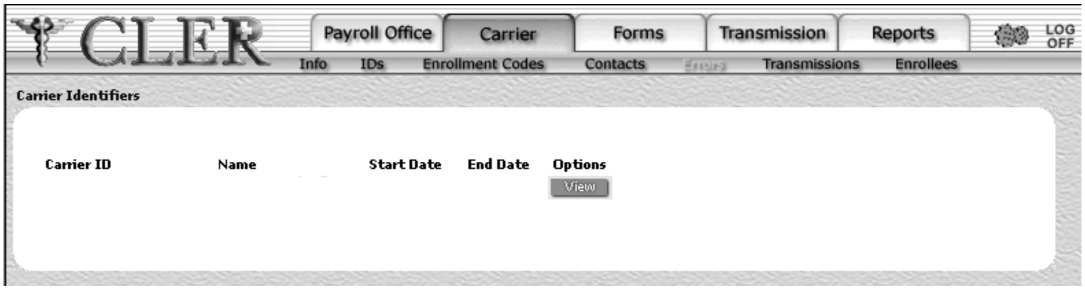


Figure 2:34. Carrier Identifiers Search Results Page

4. Click **[View]** next to the applicable record. The Carrier Identifiers View page (**Figure 2:35**) is displayed. For field descriptions, see **Carrier Identifiers View Page Field Descriptions** in **Part 3**.

   Note: To view another record, click your browser's Back button to return to the Carrier Identifiers Search Results page and click **[View]** next to the applicable record.

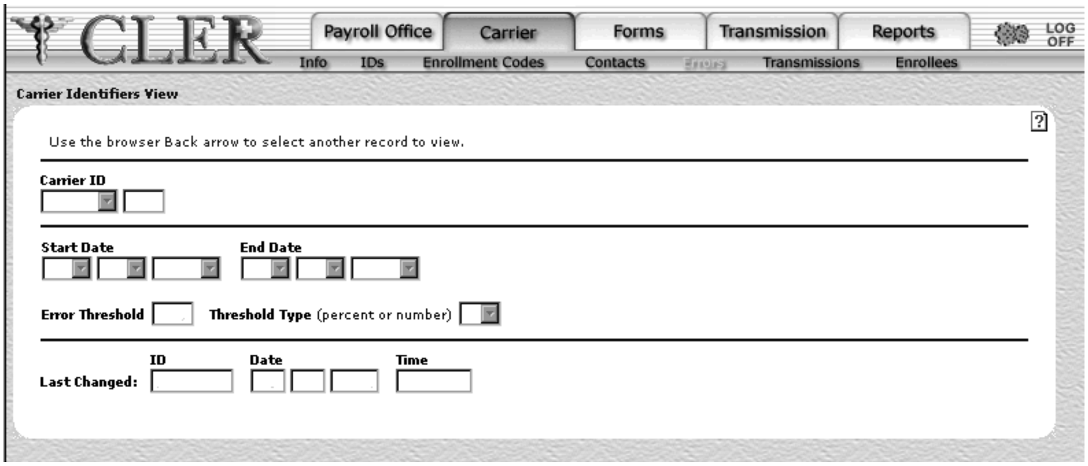


Figure 2:35. Carrier Identifiers View Page

Viewing Carrier Enrollment Code Records

The Enrollment Codes option on the Carrier Main Page (**Figure 2:29**) allows users to view information about each carrier's enrollment codes. This information includes plan, option, and valid date ranges.

To view a carrier enrollment code record:

1. Click **[Carrier]** at the top of the CLER Main Menu (**Figure 1:2**). The Carrier Main Page (**Figure 2:29**) is displayed.

2. Click **[Enrollment Codes]** at the top of the Carrier Main Page. The Carrier Enrollment Codes page (**Figure 2:36**) is displayed.

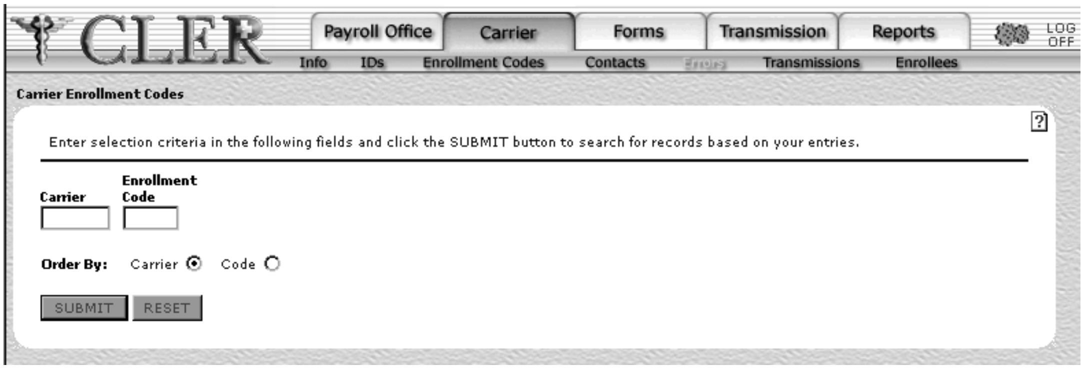


Figure 2:36. Carrier Enrollment Codes Page

3. Complete the fields on the Carrier Enrollment Codes page (**Figure 2:36**) as indicated under **Carrier Enrollment Codes Page Field Instructions** in **Part 3** and click **[Submit]**. The Carrier Enrollment Codes Search Results page (**Figure 2:37**) is displayed. For field descriptions, see **Carrier Enrollment Codes Search Results Page Field Descriptions** in **Part 3**.

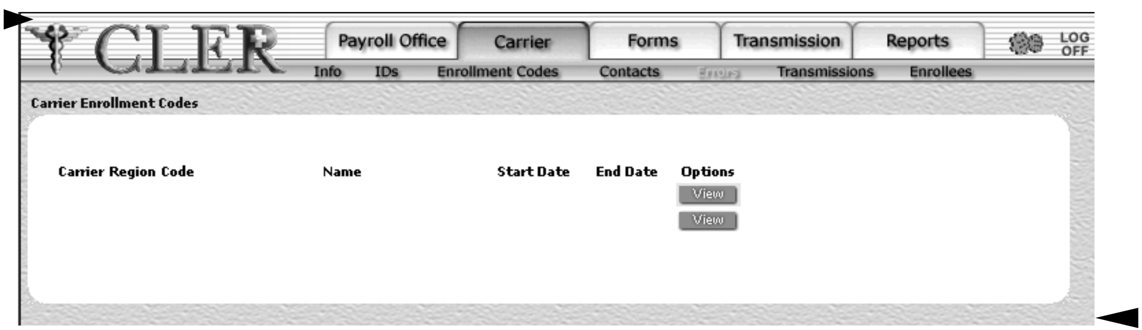


Figure 2:37. Carrier Enrollment Codes Search Results Page

4. Click **[View]** next to the applicable record. The Carrier Enrollment Codes View page (**Figure 2:38**) is displayed. For field descriptions, see **Carrier Enrollment Codes View Page Field Descriptions** in **Part 3**.

   Note: To view another record, click you browser's Back button to return to the Carrier Enrollment Codes Search Results page and click **[View]** next to the applicable record.

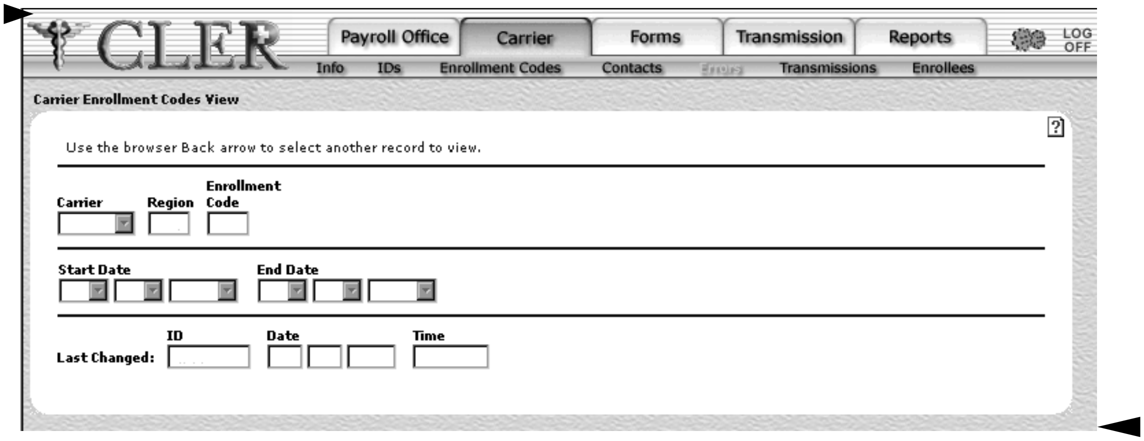


Figure 2:38. Carrier Enrollment Codes View Page

Viewing Carrier And Carrier Plan Contact Records

The Contacts option on the Carrier Main Page (**Figure 2:29**) allows users to view information about subject matter and technical contacts for each carrier.

For more information, see:

[Viewing A Carrier Contact Record]
[Viewing A Carrier Plan Contact Record]

Viewing A Carrier Contact Record

The View function allows users to view carrier contact records.

To view a carrier contact record:

1. Click **[Carrier]** at the top of the CLER Main Menu (**Figure 1:2**). The Carrier Main Page (**Figure 2:29**) is displayed.

2. Click **[Contacts]** at the top of the Carrier Main Page. The Contacts Main Page (**Figure 2:39**) is displayed with the Carrier Contacts and Carrier Plan Contacts options.

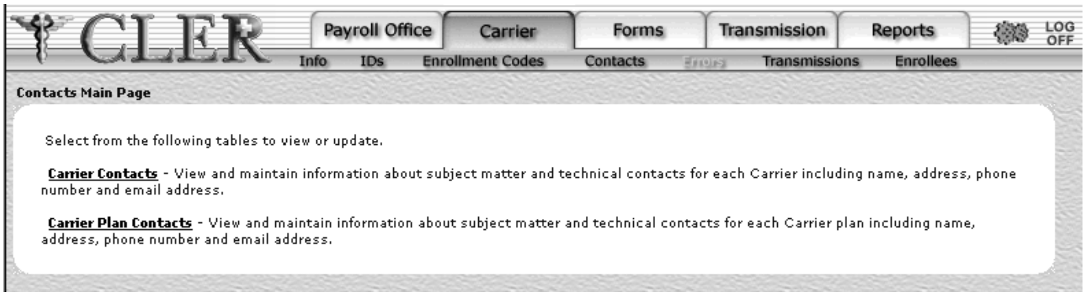


Figure 2:39. Contacts Main Page

3. Click **[Carrier Contacts]** on the Contacts Main Page to display the Carrier Contacts page (**Figure 2:40**).

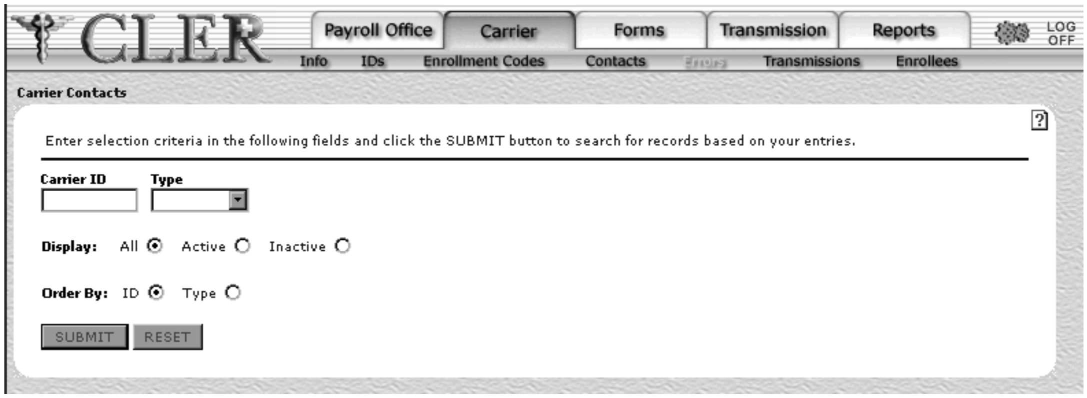


Figure 2:40. Carrier Contacts Page

4. Complete the fields on the Carrier Contacts page (**Figure 2:40**) as indicated under **Carrier Contacts Page Field Instructions** in **Part 3** and click **[Submit]**. The Carrier Contacts Search Results page (**Figure 2:41**) is displayed. For field descriptions, see **Carrier Contacts Search Results Page Field Descriptions** in **Part 3**.

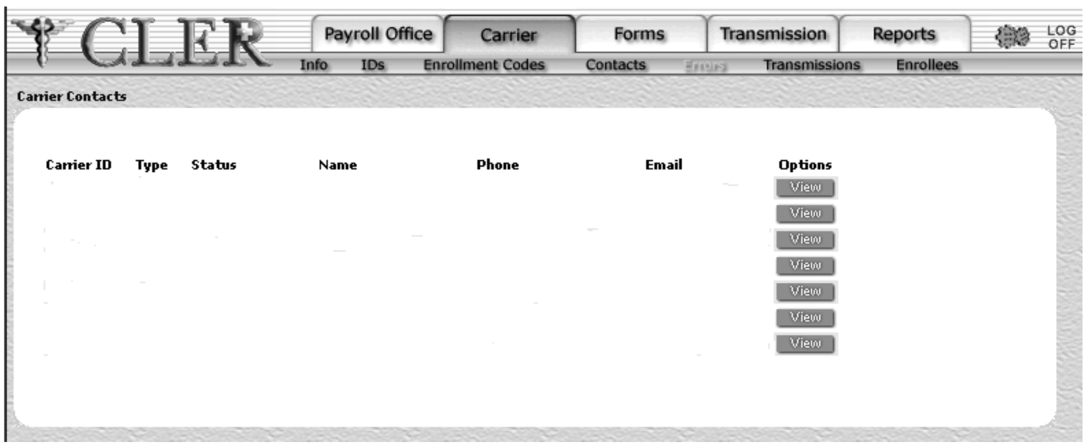


Figure 2:41. Carrier Contacts Search Results Page

5. Click **[View]** next to the applicable record. The Carrier Contacts View page (**Figure 2:42**) is displayed. For field descriptions, see **Carrier Contacts View Page Field Descriptions** in **Part 3**.

   Note: To view another record, click your browser's Back button to return to the Carrier Contacts Search Results page and click **[View]** next to the applicable record.

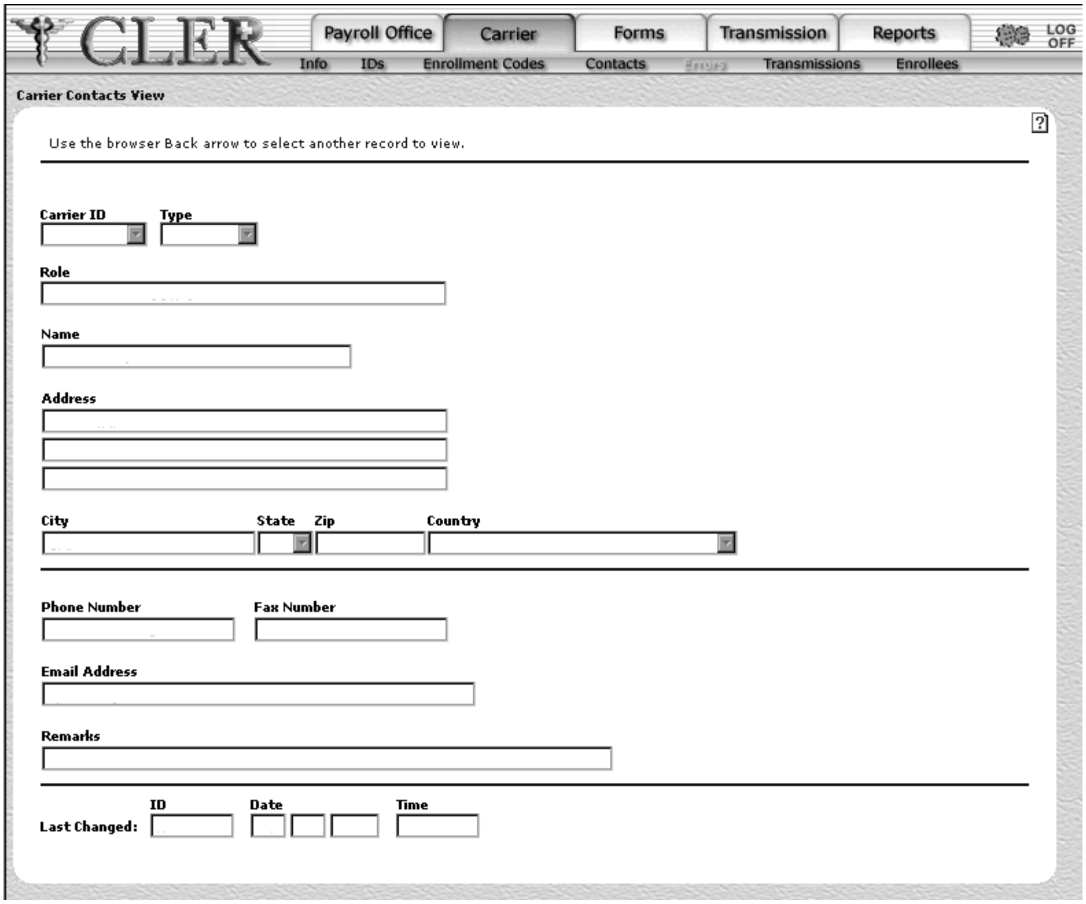


Figure 2:42. Carrier Contacts View Page

Viewing A Carrier Plan Contact Record

The View function allows users to view carrier plan contact records.

To view a carrier plan contact record:

1. Click **[Carrier]** at the top of the CLER Main Menu (**Figure 1:2**). The Carrier Main Page (**Figure 2:29**) is displayed.

2. Click **[Contacts]** at the top of the Carrier Main Page. The Contacts Main Page (**Figure 2:39**) is displayed with the Carrier Contacts and Carrier Plan Contacts options.

3. Click **[Carrier Plan Contacts]** on the Contacts Main Page to display the Carrier Plan Contacts Page (**Figure 2:43**).

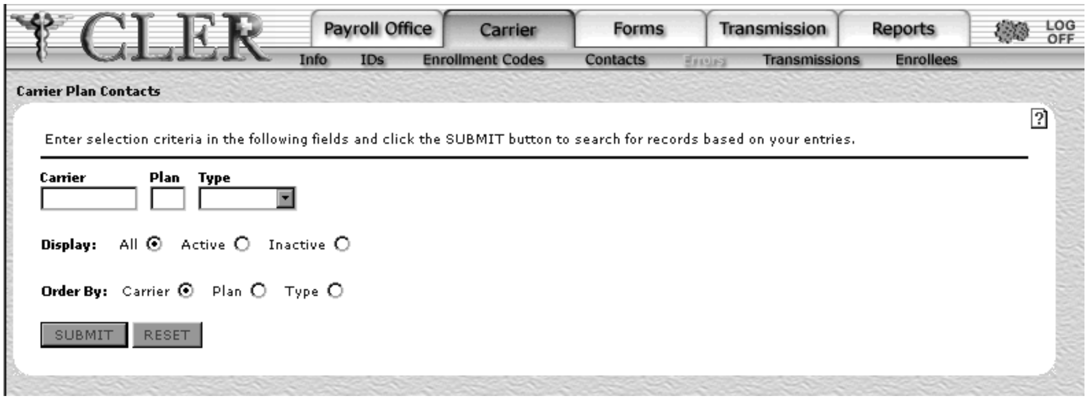


Figure 2:43. Carrier Plan Contacts Page

4. Complete the fields on the Carrier Plan Contacts page as indicated under **Carrier Plan Contacts Page Field Instructions** in **Part 3** and click **[Submit]**. The Carrier Plan Contacts Search Results page (**Figure 2:44**) is displayed. For field descriptions, see **Carrier Plan Search Results Page Field Descriptions** in **Part 3**.

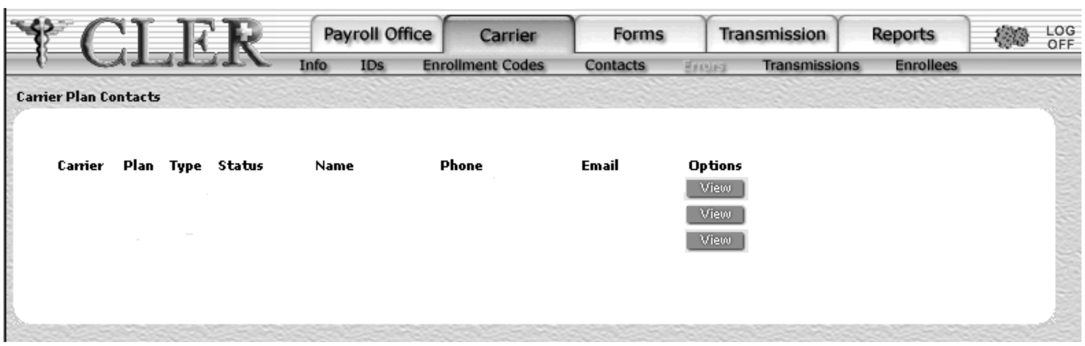


Figure 2:44. Carrier Plan Contacts Search Results Page

5. Click **[View]** next to the applicable record. The Carrier Plan Contacts View page (**Figure 2:45**) is displayed. For field descriptions, see **Carrier Plan Contacts View Page Field Descriptions** in **Part 3**.

   Note: To view another record, click your browser's Back button to return to the Carrier Plan Contacts Search Results page and click **[View]** next to the applicable record.

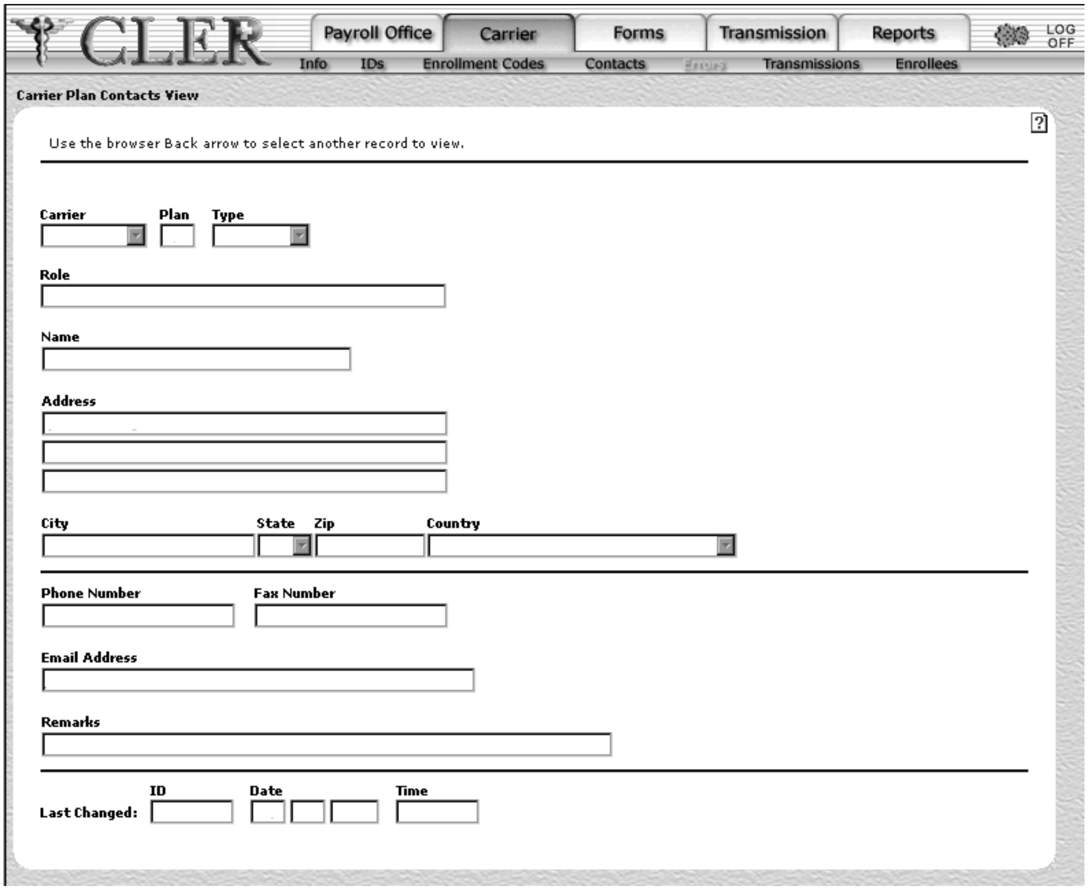


Figure 2:45. Carrier Plan Contacts View Page

Viewing Carrier Transmission Records

The Transmission option on the Carrier Main Page (**Figure 2:29**) allows users to view information about each transmission file submitted by a carrier by processing year and quarter. An agency should view a carrier's transmission records before trying to resolve that carrier's enrollment record discrepancies. This will ensure an agency that they have access to the most current data from the carrier.

To view a carrier transmission record:

1. Click **[Carrier]** at the top of the CLER Main Menu (**Figure 1:2**). The Carrier Main Page (**Figure 2:29**) is displayed.

2. Click **[Transmissions]** at the top of the Carrier Main Page. The Carrier Transmissions page (**Figure 2:46**) is displayed.

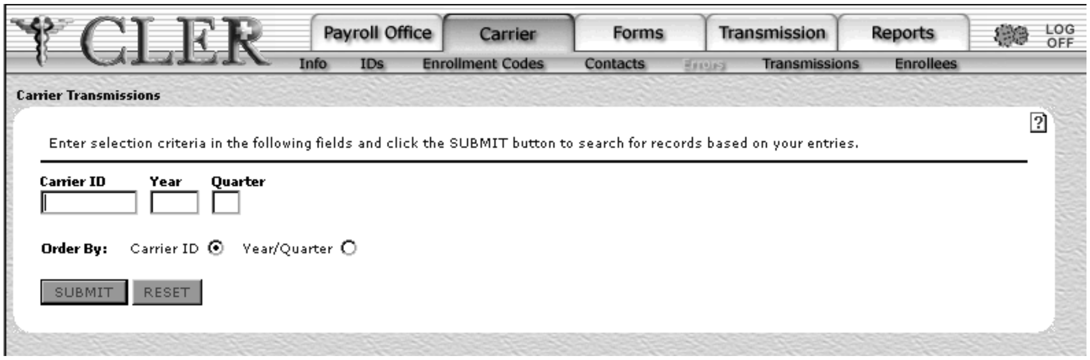


Figure 2:46. Carrier Transmissions Page

3. Complete the fields on the Carrier Transmissions page as indicated under **[Carrier Transmissions Page Field Instructions]** in **Part 3** and click **[Submit]**. The Carrier Transmissions Search Results page (**Figure 2:47**) is displayed. For field descriptions, see **[Carrier Transmissions Search Results Page Field Descriptions]** in **Part 3**.

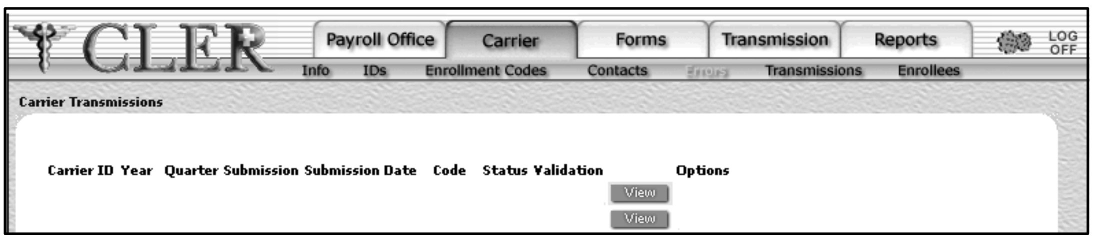


Figure 2:47. Carrier Transmissions Search Results Page

4. Click **[View]** next to the applicable record. The Carrier Transmissions View page (**Figure 2:48**) is displayed. For field descriptions, see **[Carrier Transmissions View Page Field Descriptions]** in **Part 3**.

   Note: To view another record, click your browser's Back button to return to the Carrier Transmissions Search Results page and click **[View]** next to the applicable record.

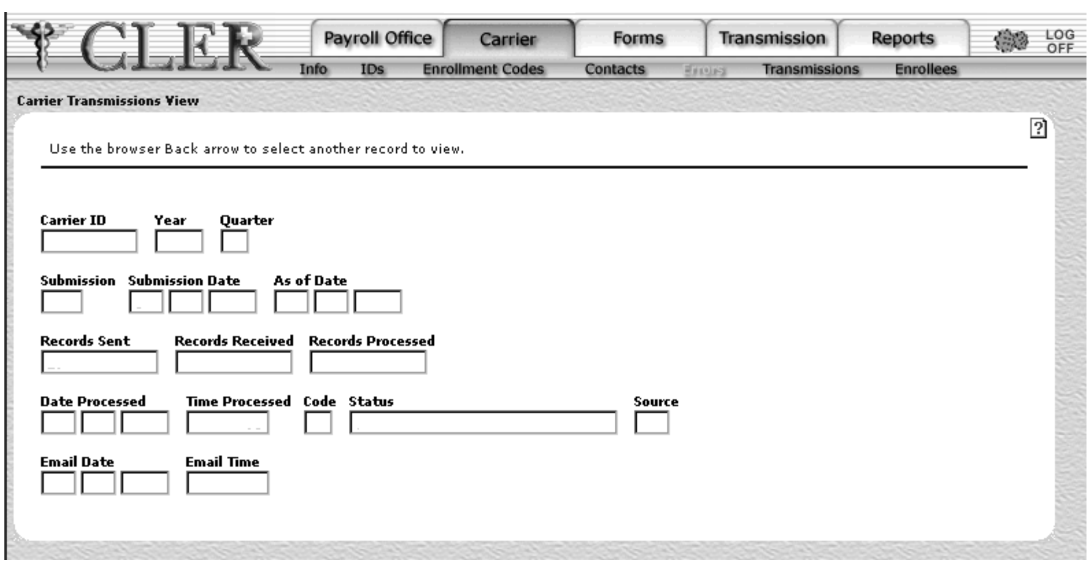


Figure 2:48. Carrier Transmissions View Page

►Maintaining Carrier Enrollee Records Marked With Discrepancy Code 160

The Enrollees option on the Carrier Main Page (**Figure 2:29**) allows agency users to view and validate carrier enrollee records marked with **Discrepancy Code 160**. For a description of **Discrepancy Code 160**, see Discrepancy Codes Table in **Part 4**.

Note: Carrier users are able to view and reconcile payroll office enrollee records marked with **Discrepancy Code 163**. Thus, the Reconcile function allows carrier users to communicate with agencies about payroll office enrollee records marked with **Discrepancy Code 163**. For a description of **Discrepancy Code 163**, see Discrepancy Codes Table in **Part 4**.

For information about viewing and validating carrier enrollee records marked with **Discrepancy Code 160**, see:

Viewing A Carrier Enrollee Record Marked With Discrepancy Code 160

Validating A Carrier Enrollee Record Marked With Discrepancy Code 160

Viewing A Carrier Enrollee Record Marked With Discrepancy Code 160

The View function allows agency users to view carrier enrollee records marked with **Discrepancy Code 160**. For a description of **Discrepancy Code 160**, see Discrepancy Codes Table in **Part 4**.

To view a carrier enrollee record marked with Discrepancy Code 160:

1. Click **[Carrier]** at the top of the CLER Main Menu (**Figure 1:2**). The Carrier Main Page (**Figure 2:29**) is displayed.
2. Click **[Enrollees]** at the top of the Carrier Main Page. The Carrier Enrollees page (**Figure 2:49**) is displayed.

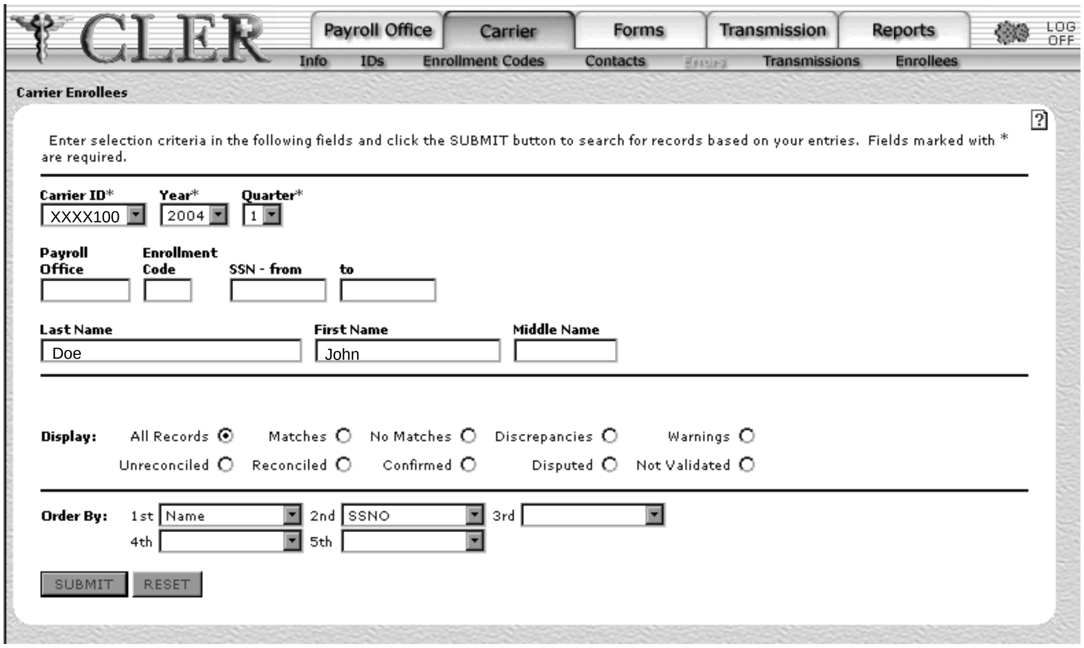


Figure 2:49. Carrier Enrollees Page

3. Complete the fields on the Carrier Enrollees page as indicated under **Carrier Enrollees Page Field Instructions** in **Part 3** and click **[Submit]**. The Carrier Enrollees Search Results page (**Figure 2:50**) is displayed showing the carrier enrollee records. Only carrier enrollee records marked with **Discrepancy Code 160** are displayed. For field descriptions, see **Carrier Enrollees Search Results Page Field Descriptions** in **Part 3**.

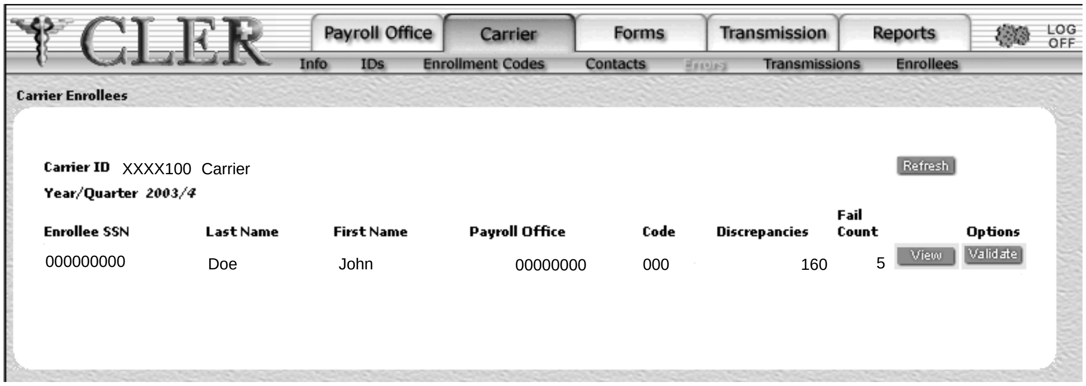


Figure 2:50. Carrier Enrollees Search Results Page

4. Click **[View]** next to the applicable record. The Carrier Enrollees View page (**Figure 2:51**) is displayed showing the selected carrier enrollee record. For field descriptions, see **Carrier Enrollees View Page Field Descriptions** in **Part 3**.

   Note: To view another record, click your browser's Back button to return to the Carrier Enrollees Search Results page and click **[View]** next to the applicable record.

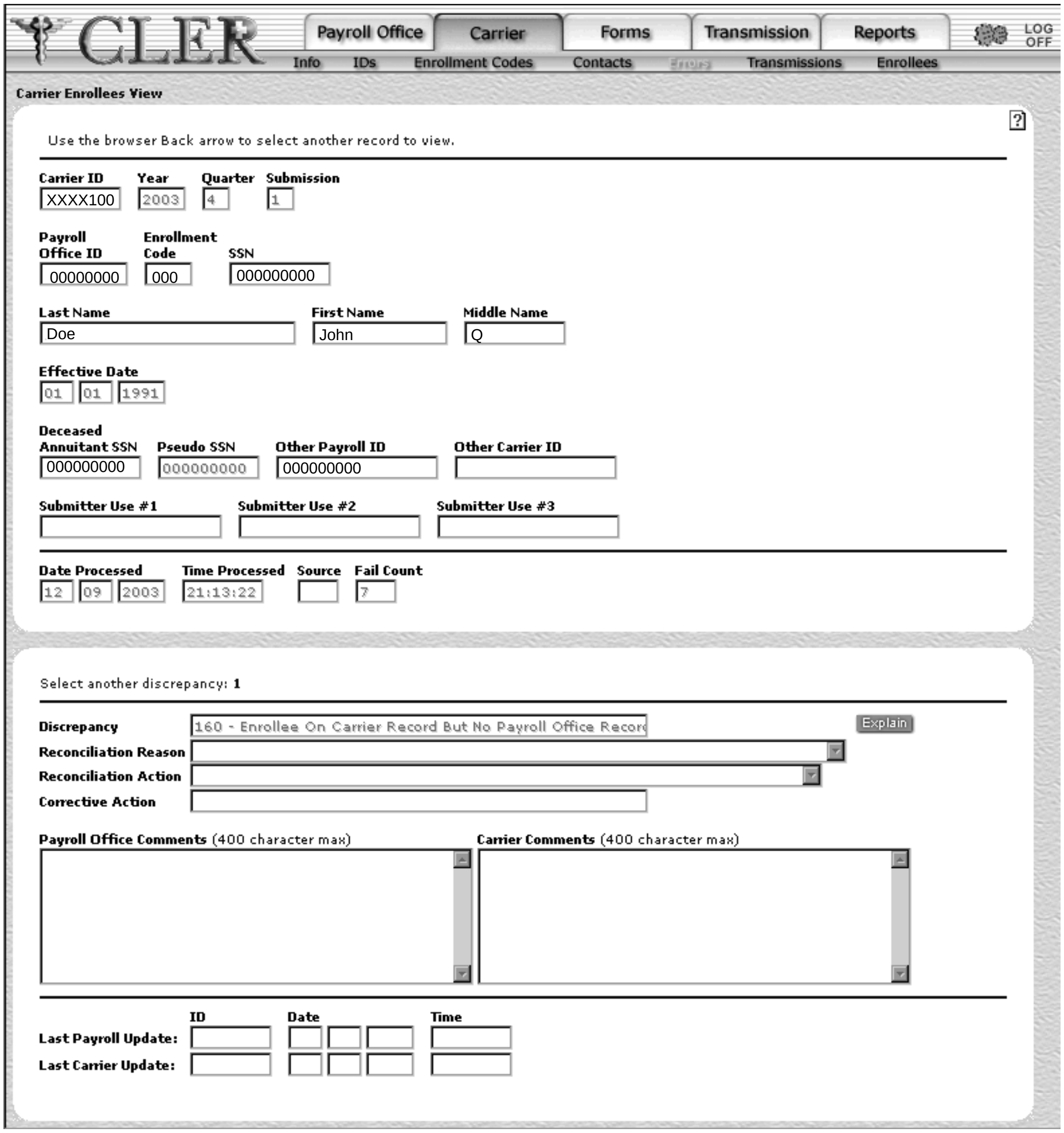


Figure 2:51. Carrier Enrollees View Page

Validating A Carrier Enrollee Record Marked With Discrepancy Code 160

The Validate function allows agency users to communicate with carriers about carrier enrollee records marked with **Discrepancy Code 160**. For a description of **Discrepancy Code 160**, see **Discrepancy Codes Table** in **Part 4**.

To validate a carrier enrollee record marked with Discrepancy Code 160:

1. Click **[Carrier]** at the top of the CLER Main Menu (**Figure 1:2**). The Carrier Main Page (**Figure 2:29**) is displayed.

2. Click **[Enrollees]** at the top of the Carrier Main Page. The Carrier Enrollees page (**Figure 2:49**) is displayed.

3. Complete the fields on the Carrier Enrollees page as indicated under **Carrier Enrollees Page Field Instructions** in **Part 3** and click **[Submit]**. The Carrier Enrollees Search Results page (**Figure 2:50**) is displayed showing the carrier enrollee records. Only carrier enrollee records marked with **Discrepancy Code 160** are displayed. For field descriptions, see **Carrier Enrollees Search Results Page Field Descriptions** in **Part 3**.

4. Click **[Validate]** next to the applicable record. The Payroll Office Enrollees Validate page (**Figure 2:52**) is displayed showing the selected carrier enrollee record.

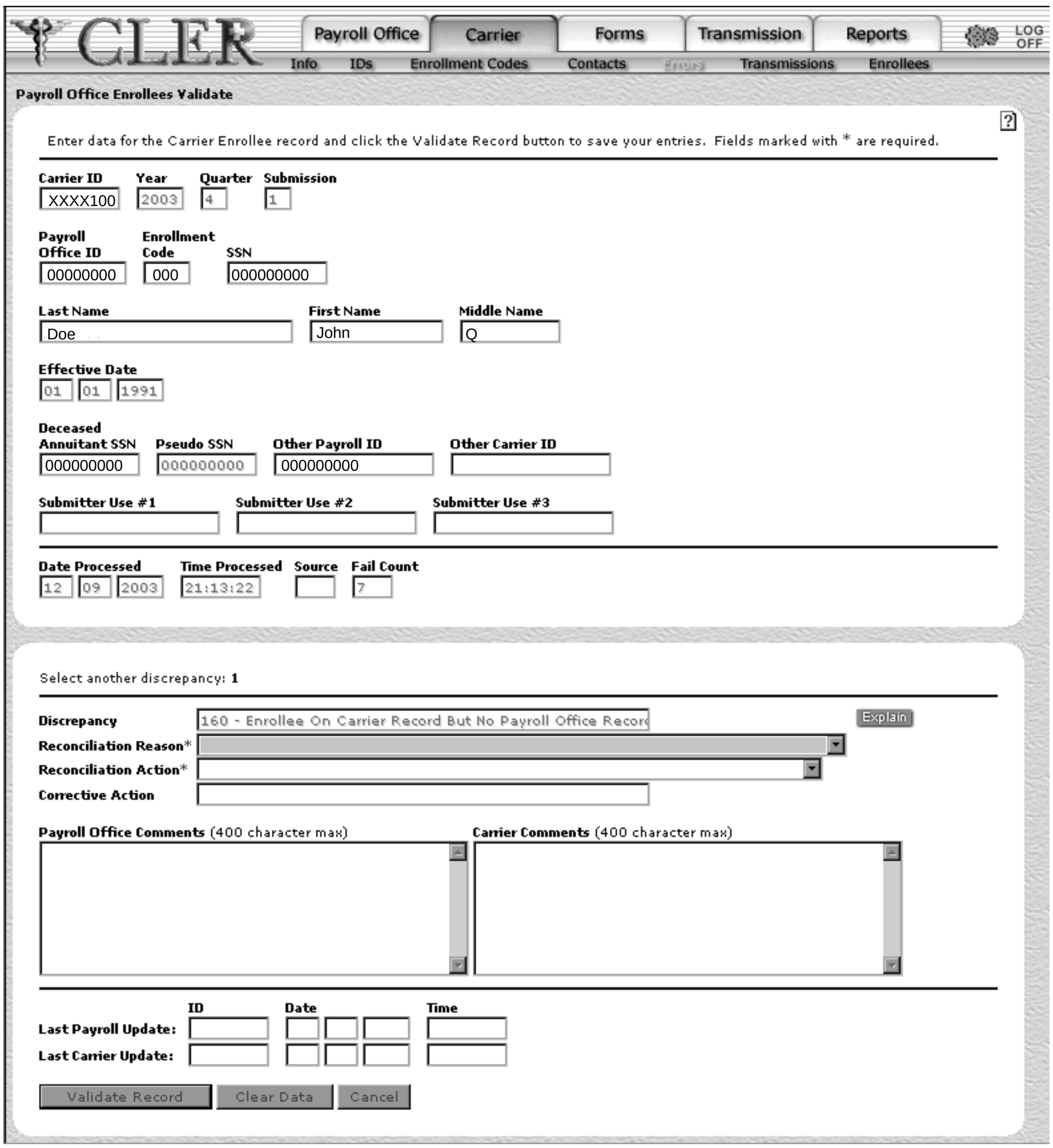


Figure 2:52. Payroll Office Enrollees Validate Page

5. Complete the fields on the Payroll Office Enrollees Validate page as indicated under **Payroll Office Enrollees Validate Page Field Instructions** in **Part 3**.

6. Click **[Validate Record]**. If no errors occur, a pop-up message is displayed to confirm the record has been validated.

7. Click **[OK]** to close the pop-up.

Note: To validate another record, click **[Cancel]** to return to the Carrier Enrollees Search Results page and click **[Validate]** next to the applicable record.◄

Maintaining Forms Records

The Forms option provides the 2809 and 2810 options. These options contain the same data fields as Forms SF-2809, Health Benefits Election Form, and SF-2810, Notice of Change in Health Benefits Enrollment. With proper access authority, additional records may be added and current records may be updated or deleted.

This section presents more information under the following topics:

[Maintaining 2809 Records](#)

[Maintaining 2810 Records](#)

Maintaining 2809 Records

The 2809 option on the Forms Main Page (**Figure 2:53**) allows agency users to create a 2809 record in CLER. The CLER 2809 provides carriers with the information they need to update their enrollee records. With the proper access authority, forms may be created, deleted, printed, and released for processing. From the input that creates the 2809, CLER will generate a corrective action file to the carrier through the OPM Data Hub located in Macon, Georgia. It should be noted that this is an option; agencies may use other procedures such as fax, hardcopy, etc., to coordinate corrective action(s) with the carriers.

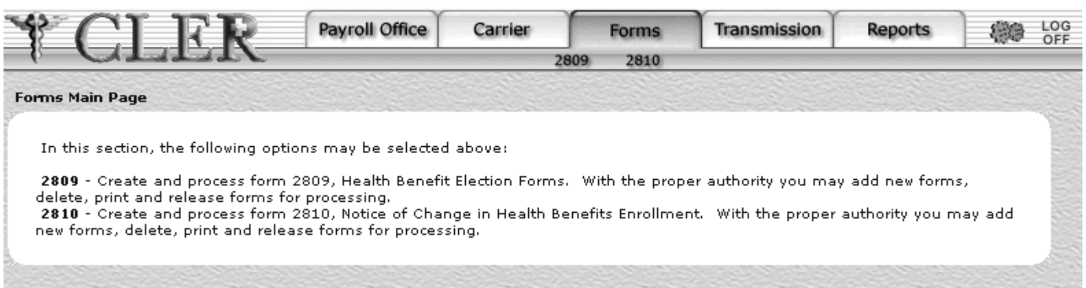


Figure 2:53. Forms Main Page

For more information, see:

[Adding A 2809 Record](#)

[Viewing A 2809 Record](#)

[Updating A 2809 Record](#)

[Releasing A 2809 Record](#)

[Canceling A 2809 Record](#)

Adding A 2809 Record

The Add function allows users to add 2809 records.

To add a 2809 record:

1. Click **[Forms]** at the top of the CLER Main Menu (**Figure 1:2**). The Forms Main Page (**Figure 2:53**) is displayed.

2. Click **[2809]** at the top of the Forms Main Page. The Form 2809 page (**Figure 2:54**) is displayed.

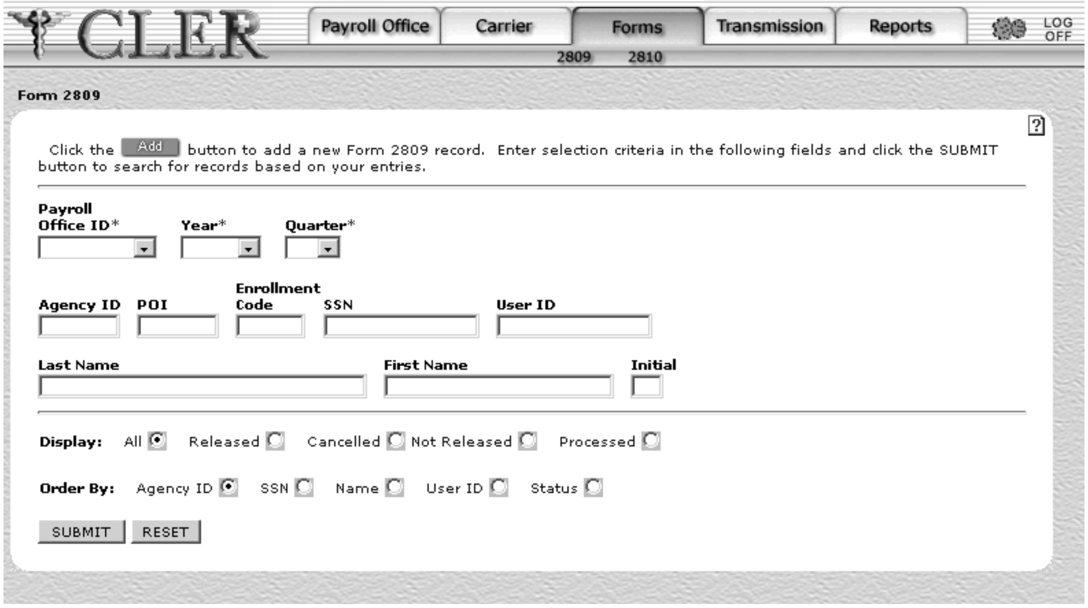


Figure 2:54. Form 2809 Page

3. Click **[Add]** on the Form 2809 page to display the Form 2809 Add (Part A) page (**Figure 2:55**).

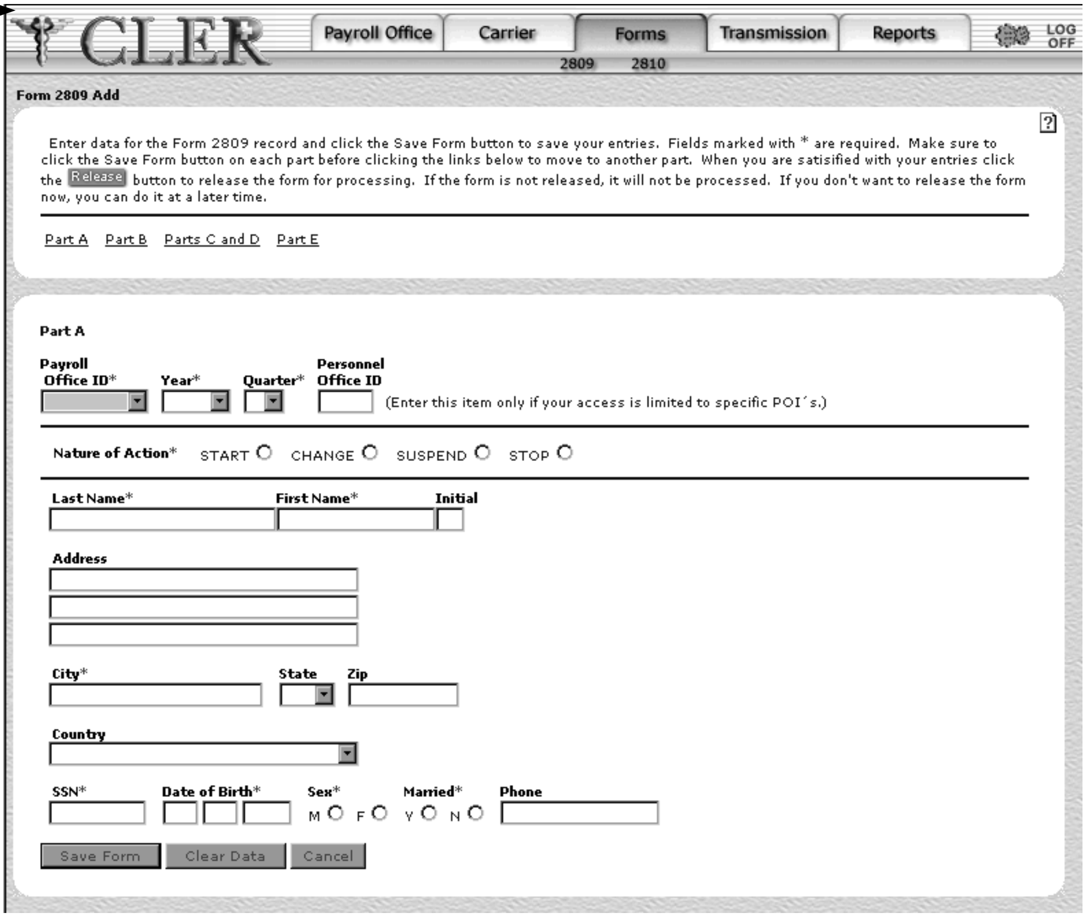


Figure 2:55. Form 2809 Add (Part A) Page

4. Complete the fields on the Form 2809 Add (Part A) page as indicated under **Form 2809 Add (Part A) Page Field Instructions** in **Part 3**.

5. Click **[Save Form]**. If no errors occur, a pop-up message is displayed to confirm the record has been added.

6. Click **[OK]** to close the pop-up.

7. Click **[Part B]** at the top of the Form 2809 Add (Part A) page. The Form 2809 Add (Part B) page (**Figure 2:56**) is displayed.

   Note: ►An asterisk (*) indicates a required field. The Plan Name and Enrollment Code fields in Part B are marked with * when `Start` or `Change` is selected in the Nature of Action field in Part A. The Last Name, First Name, Date of Birth, Code, SSN, and Sex fields in Part B are marked with * when the third position of the enrollment code entered in the Enrollment Code field in Part B is **2** or **5**, indicating family coverage.◄

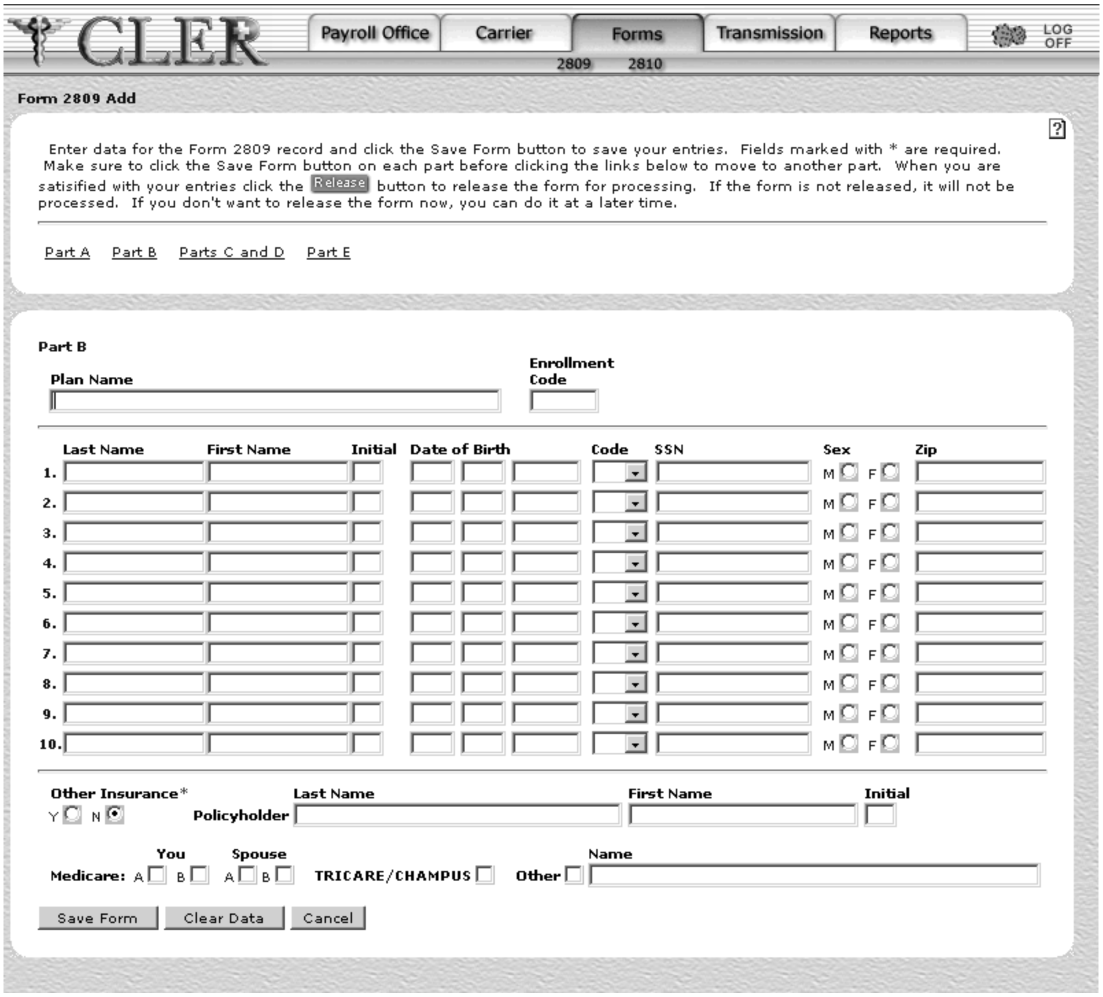


Figure 2:56. Form 2809 Add (Part B) Page

8. Complete the fields on the Form 2809 Add (Part B) page as indicated under **Form 2809 Add (Part B) Page Field Instructions** in **Part 3**.

9. Click **[Save Form]**. If no errors occur, a pop-up message is displayed to confirm the record has been added.

10. Click **[OK]** to close the pop-up.

11. Click **[Parts C and D]** at the top of the Form 2809 Add (Part B) page. The Form 2809 Add (Parts C and D) page (**Figure 2:57**) is displayed.

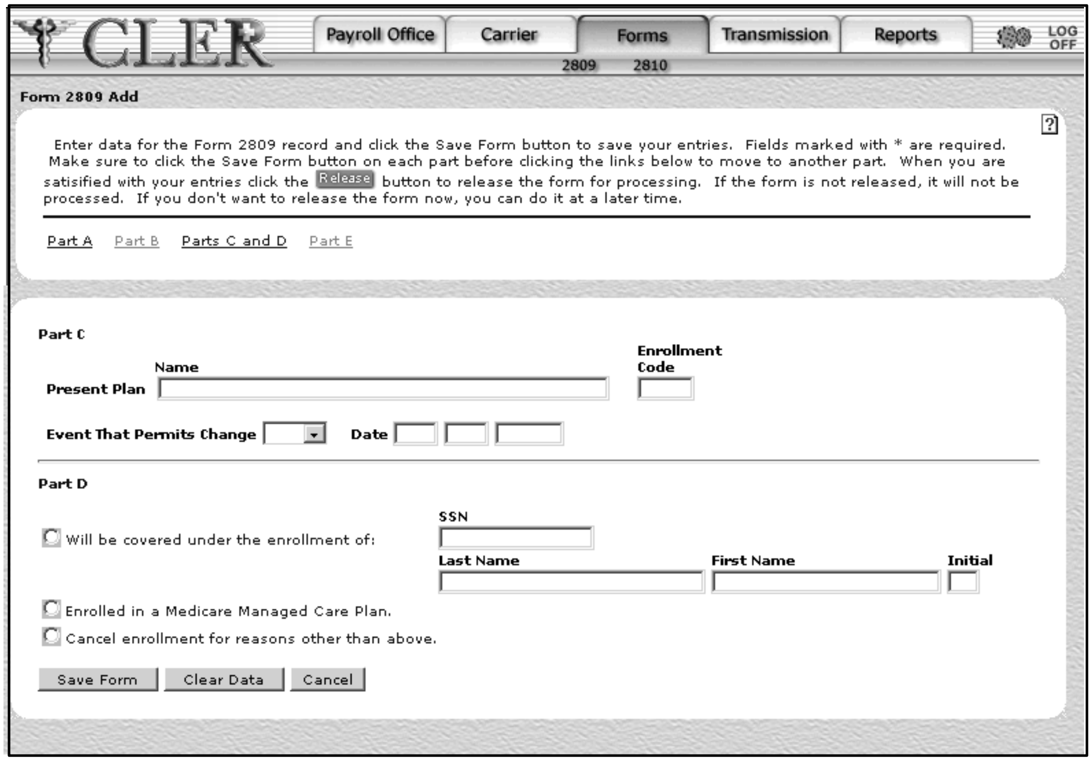


Figure 2:57. Form 2809 Add (Parts C and D) Page

12. Complete the fields on the Form 2809 Add (Parts C and D) page as indicated under **Form 2809 Add (Parts C and D) Page Field Instructions** in **Part 3**.

13. Click **[Save Form]**. If no errors occur, a pop-up message is displayed to confirm the record has been added.

14. Click **[OK]** to close the pop-up.

15. Click **[Part E]** at the top of the Form 2809 Add (Parts C and D) page. The Form 2809 Add (Part E) page (**Figure 2:58**) is displayed.

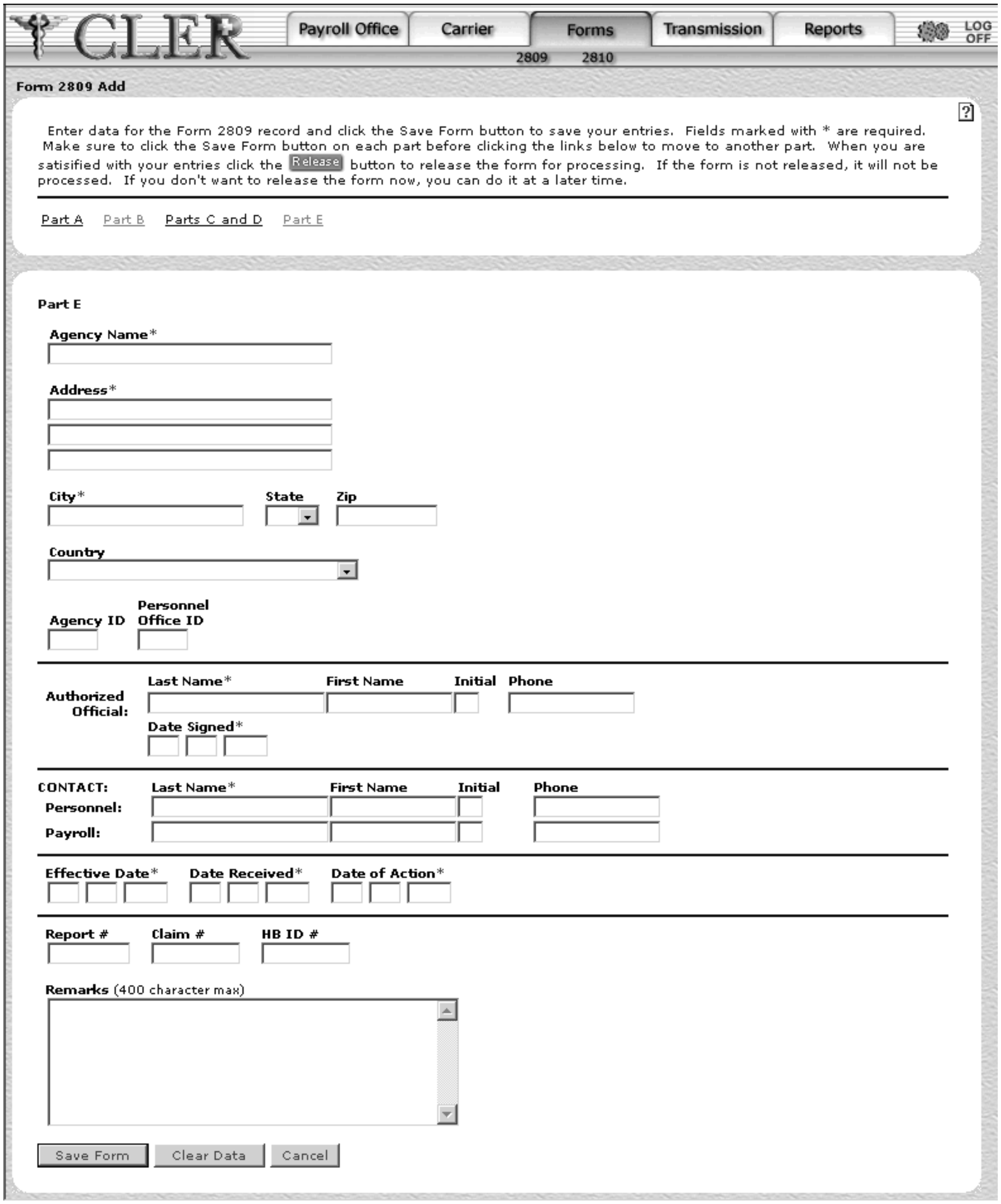


Figure 2:58. Form 2809 Add (Part E) Page

16. Complete the fields on the Form 2809 Add (Part E) page as indicated under **Form 2809 Add (Part E) Page Field Instructions** in **Part 3**.

17. Click **[Save Form]**. If no errors occur, a pop-up message is displayed to confirm the record has been added.

18. Click **[OK]** to close the pop-up.

Viewing A 2809 Record

The View function allows users to view 2809 records.

To view a 2809 record:

1. Click **[Forms]** at the top of the CLER Main Menu (**Figure 1:2**). The Forms Main Page (**Figure 2:53**) is displayed.

2. Click **[2809]** at the top of the Forms Main Page. The Form 2809 page (**Figure 2:54**) is displayed.

3. Complete the fields on the Form 2809 page as indicated under **Form 2809 Page Field Instructions** in **Part 3** and click **[Submit]**. The Form 2809 Search Results page (**Figure 2:59**) is displayed. For field descriptions, see **Form 2809 Search Results Page Field Descriptions** in **Part 3**.

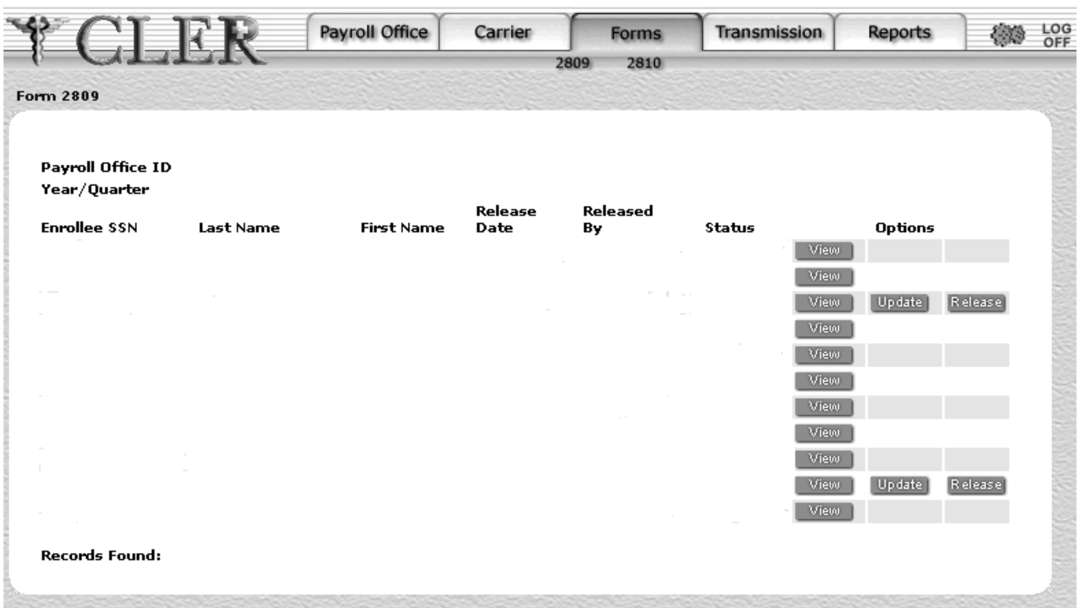


Figure 2:59. Form 2809 Search Results Page

4. Click **[View]** next to the applicable record. The Form 2809 View (Part A) page (**Figure 2:60**) is displayed. For field descriptions, see **Form 2809 View (Part A) Page Field Descriptions** in **Part 3**.

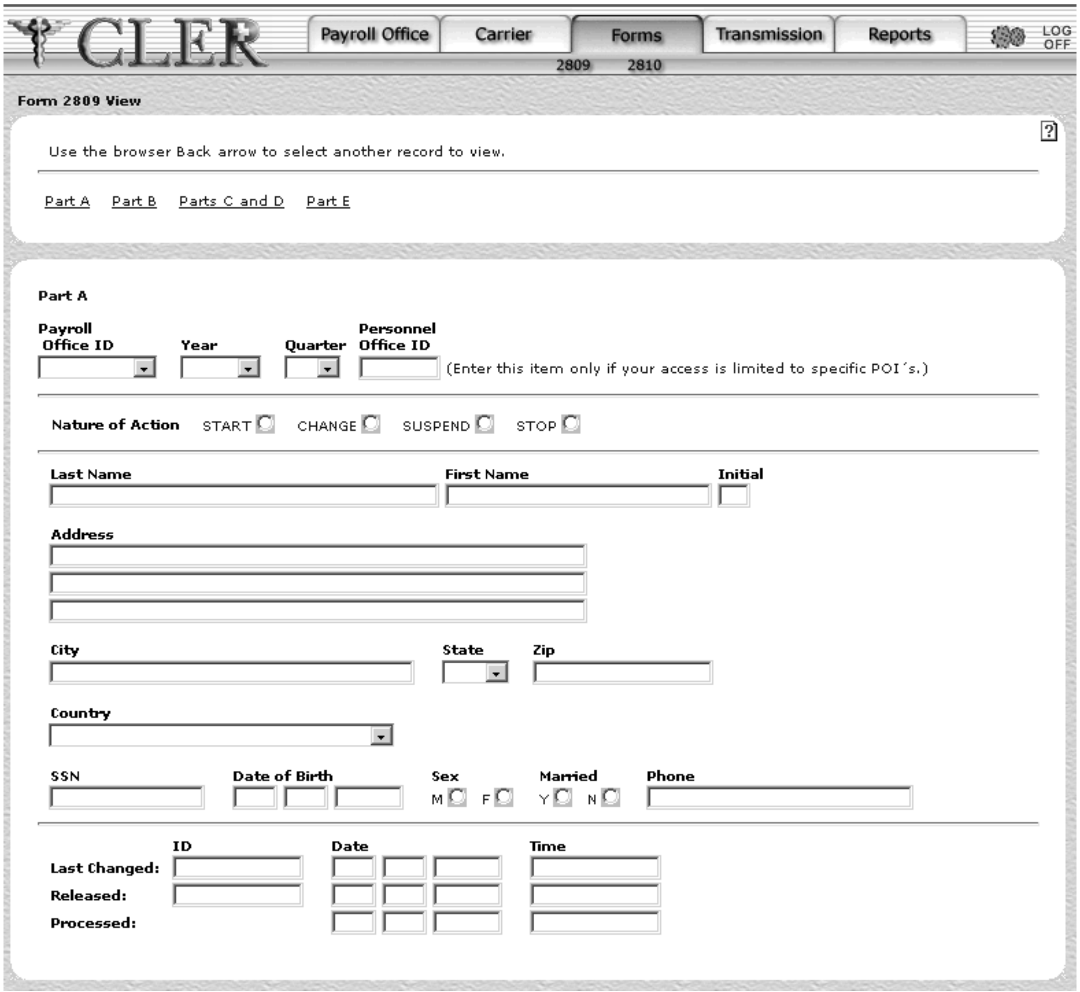


Figure 2:60. Form 2809 View (Part A) Page

5. Click **[Part B]** to display the Form 2809 View (Part B) page (**Figure 2:61**). For field descriptions, see **Form 2809 View (Part B) Page Field Descriptions** in **Part 3**.

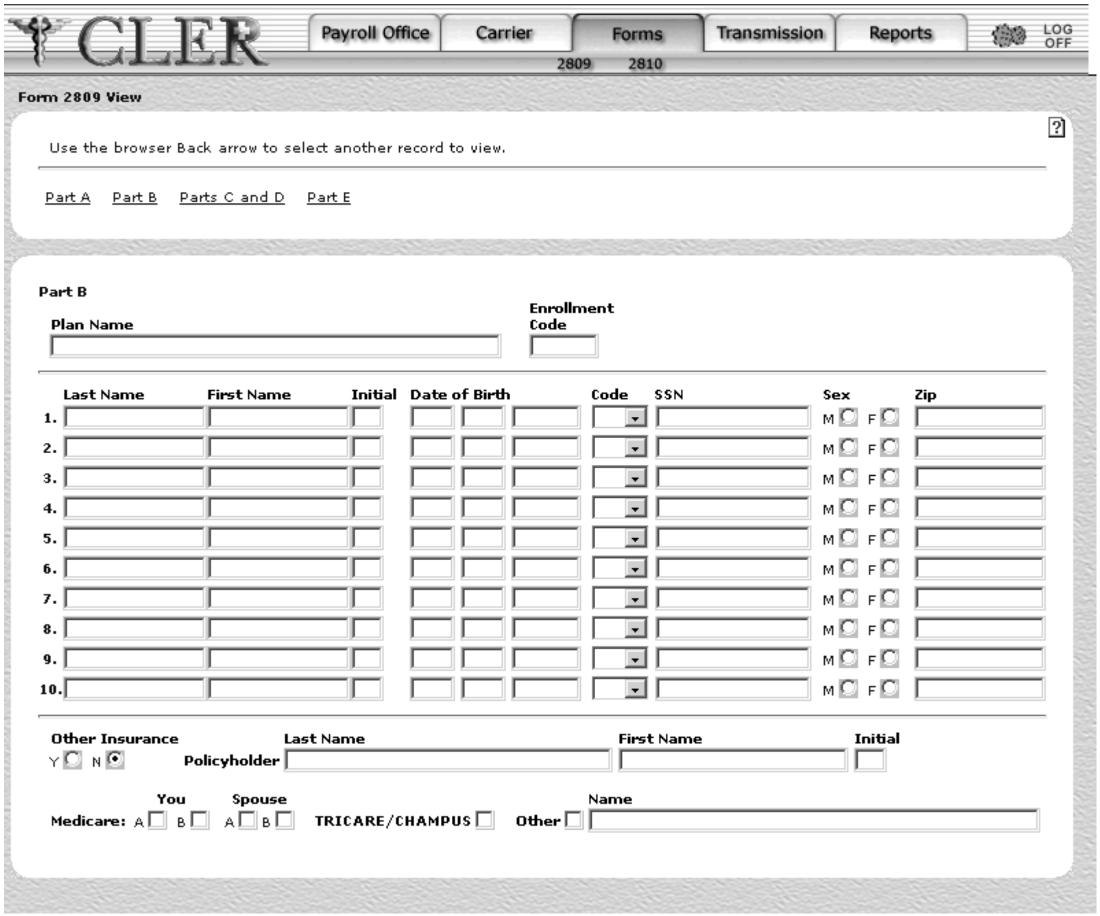


Figure 2:61. Form 2809 View (Part B) Page

6. Click **[Parts C and D]** to display the Form 2809 View (Parts C and D) page (**Figure 2:62**). For field descriptions, see **Form 2809 View (Parts C and D) Page Field Descriptions** in **Part 3**.

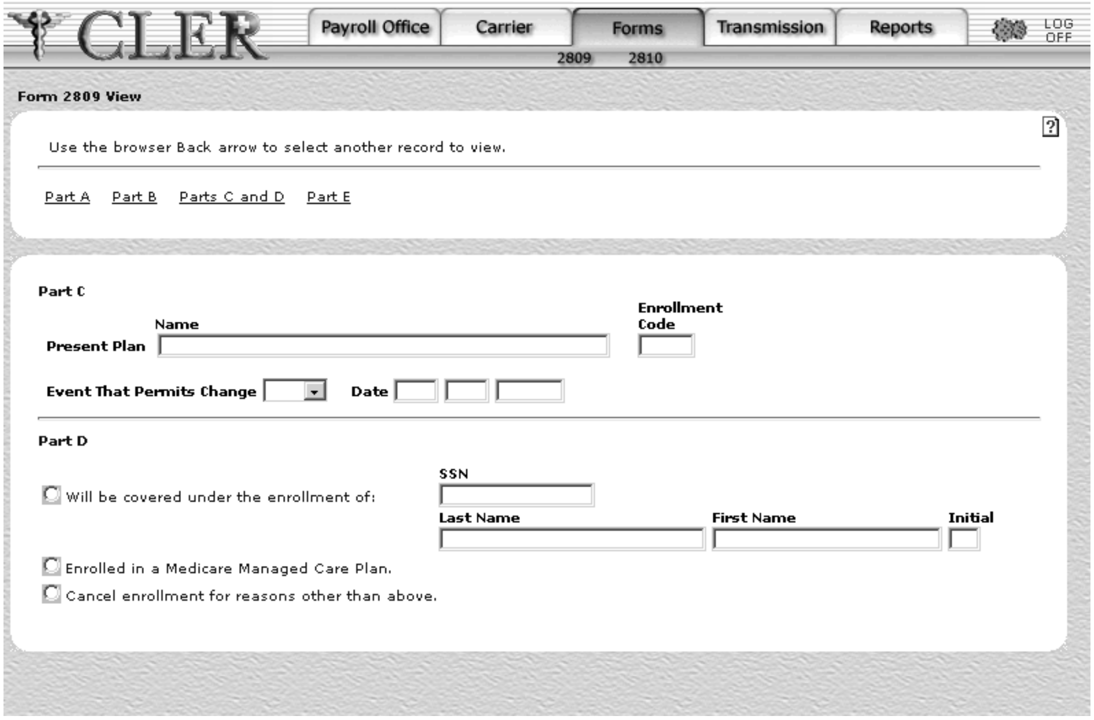


Figure 2:62. Form 2809 View (Parts C and D) Page

7. Click **[Part E]** to display the Form 2809 View (Part E) page (**Figure 2:63**). For field descriptions, see **Form 2809 View (Part E) Page Field Descriptions** in **Part 3**.

   Note: To view another record, click your browser's Back button to return to the Form 2809 Search Results page and click **[View]** next to the applicable record.

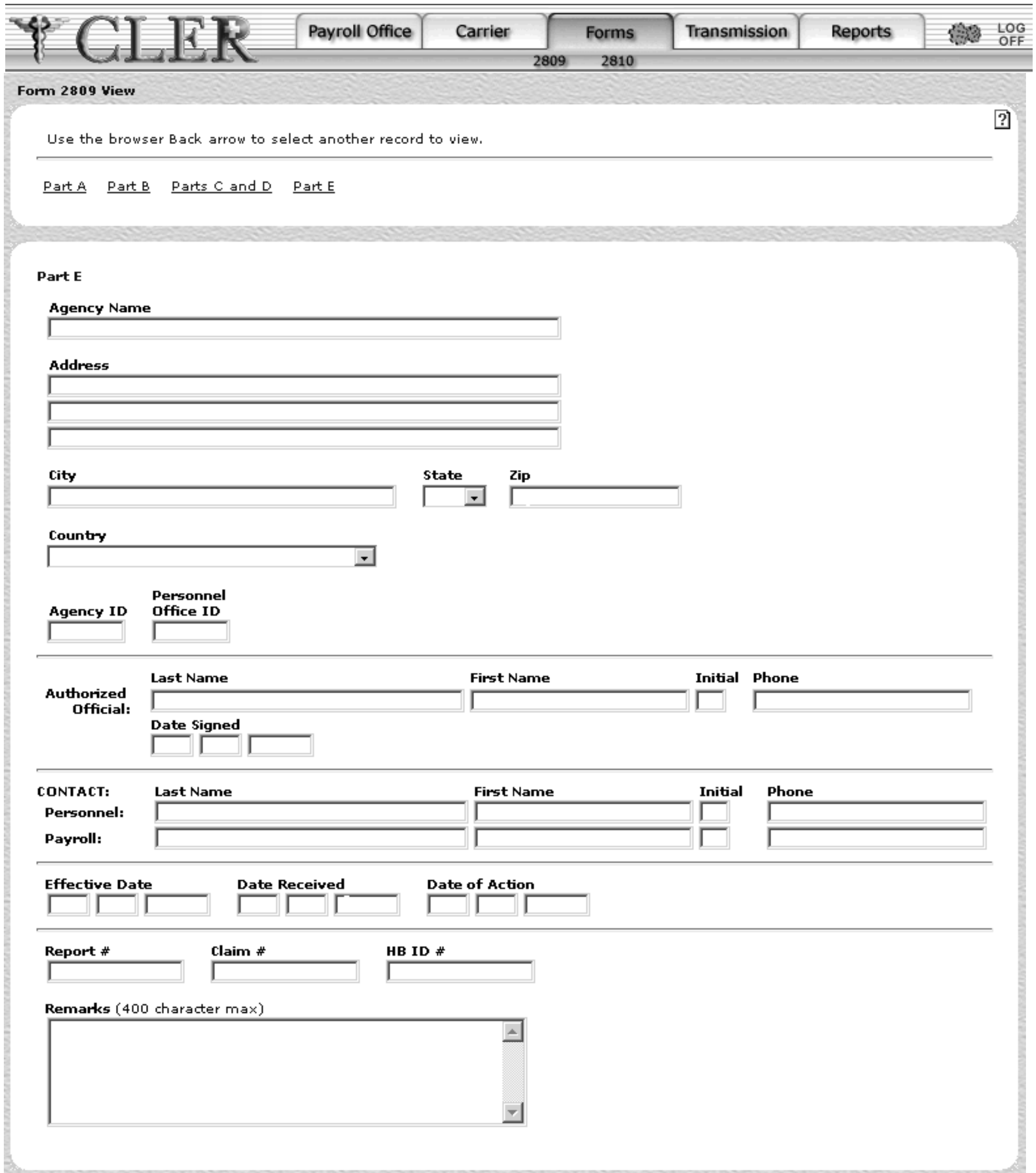


Figure 2:63. Form 2809 View (Part E) Page

Updating A 2809 Record

The Update function allows users to update 2809 records.

To update a 2809 record:

1. Click **[Forms]** at the top of the CLER Main Menu (**Figure 1:2**). The Forms Main Page (**Figure 2:53**) is displayed.

2. Click **[2809]** at the top of the Forms Main Page. The Form 2809 page (**Figure 2:54**) is displayed.

3. Complete the fields on the Form 2809 page as indicated under **[Form 2809 Page Field Instructions]** in **Part 3** and click **[Submit]**. The Form 2809 Search Results page (**Figure 2:59**) is displayed. For field descriptions, see **[Form 2809 Search Results Page Field Descriptions]** in **Part 3**.

4. Click **[Update]** next to the applicable record. The Form 2809 Update (Part A) page (**Figure 2:64**) is displayed.

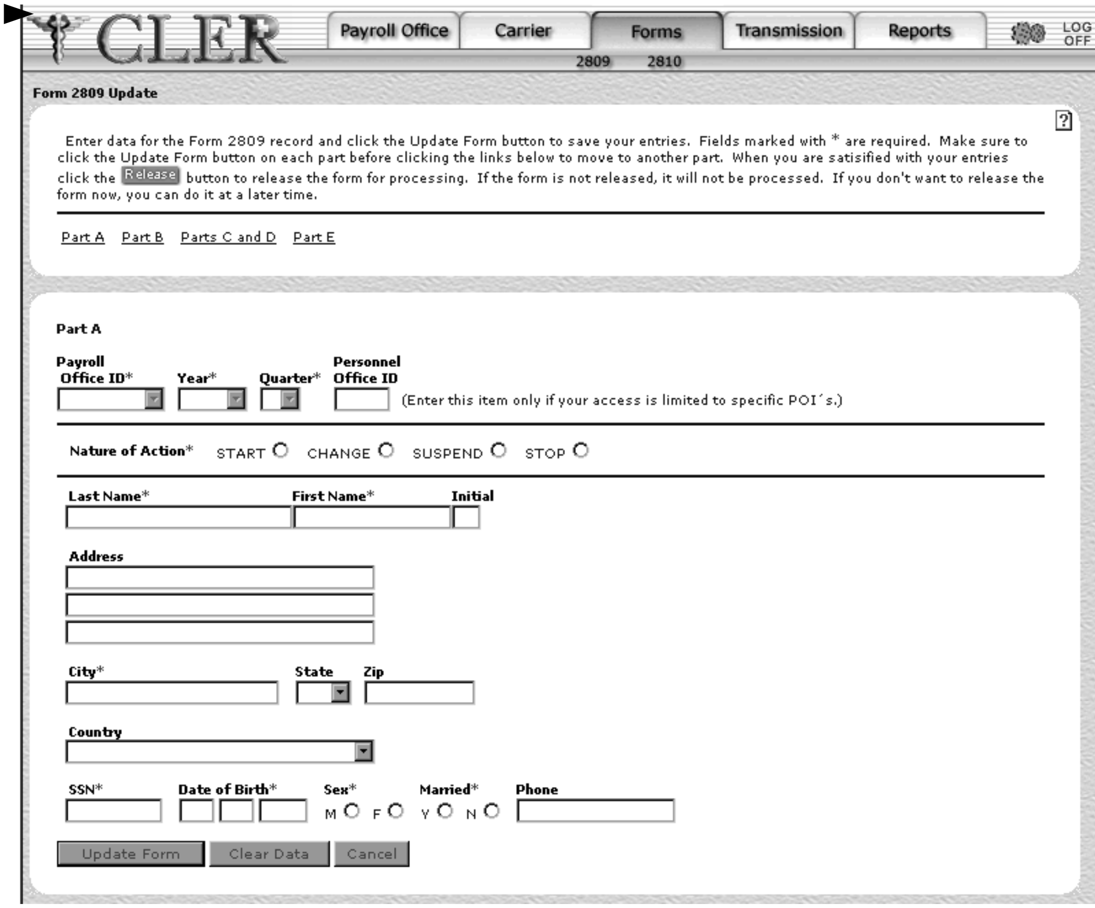


Figure 2:64. Form 2809 Update (Part A) Page

5. To update data on the Form 2809 Update (Part A) page, complete the applicable fields as indicated under **[Form 2809 Update (Part A) Page Field Instructions]** in **Part 3**.

6. Click **[Update Form]**. If no errors occur, a pop-up message is displayed to confirm the record has been updated.

7. Click **[OK]** to close the pop-up.

   After updating Part A, the following options are available:

   - To update data on the Form 2809 Update (Part B) page, click **[Part B]**. The Form 2809 Update (Part B) page (**Figure 2:65**) is displayed. For more information, see the instructions in Step 8.

     Note: ►An asterisk (`*`) indicates a required field. The Plan Name and Enrollment Code fields in Part B are marked with `*` when **`Start`** or **`Change`** is selected in the Nature of Action field in Part A. The Last Name, First Name, Date of Birth, Code, SSN, and Sex fields in Part B are marked with ***** when the third position of the enrollment code entered in the Enrollment Code field in Part B is **2** or **5**, indicating family coverage.◄

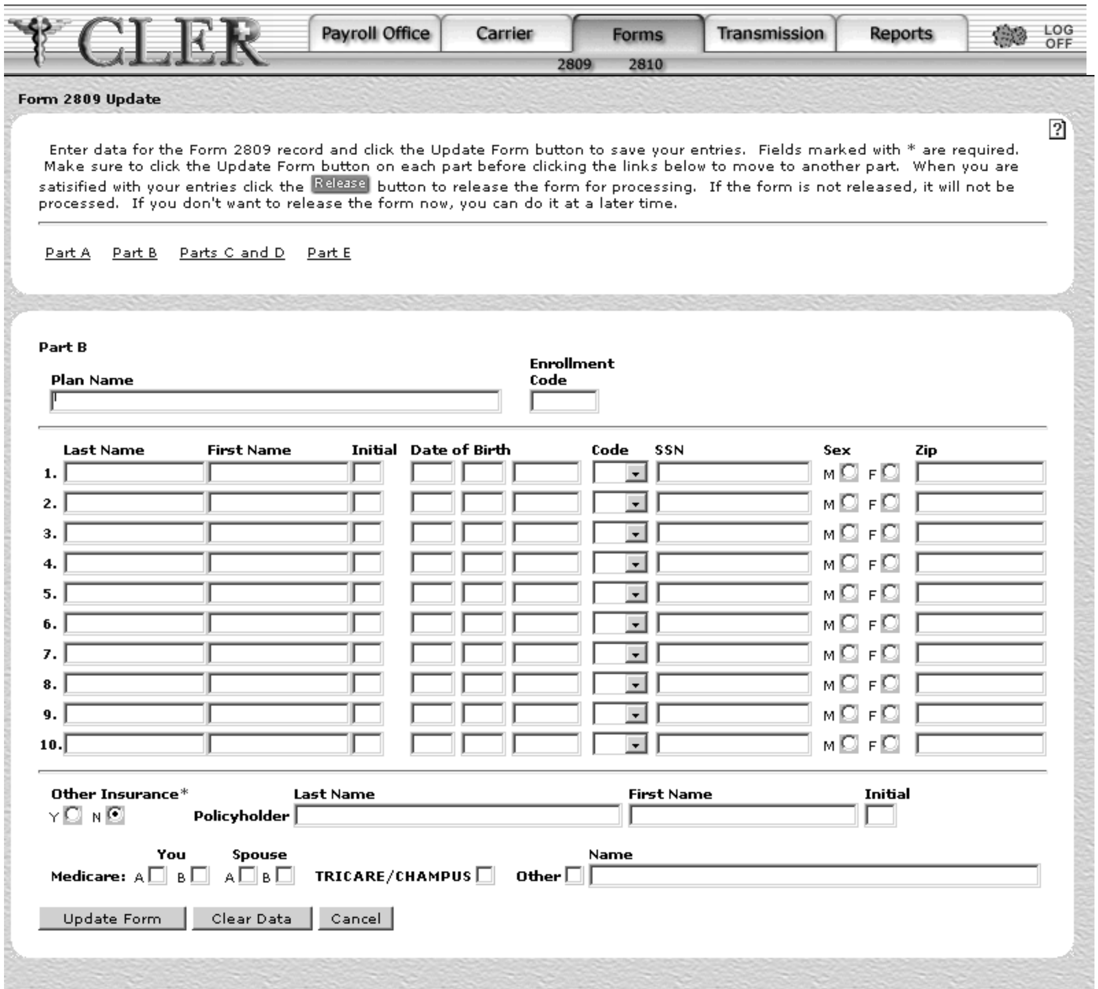


Figure 2:65. Form 2809 Update (Part B) Page

- To update data on the Form 2809 Update (Parts C and D) page, click **[Parts C and D]**. The Form 2809 Update (Parts C and D) page (**Figure 2:66**) is displayed. For more information, see the instructions in Step 11.

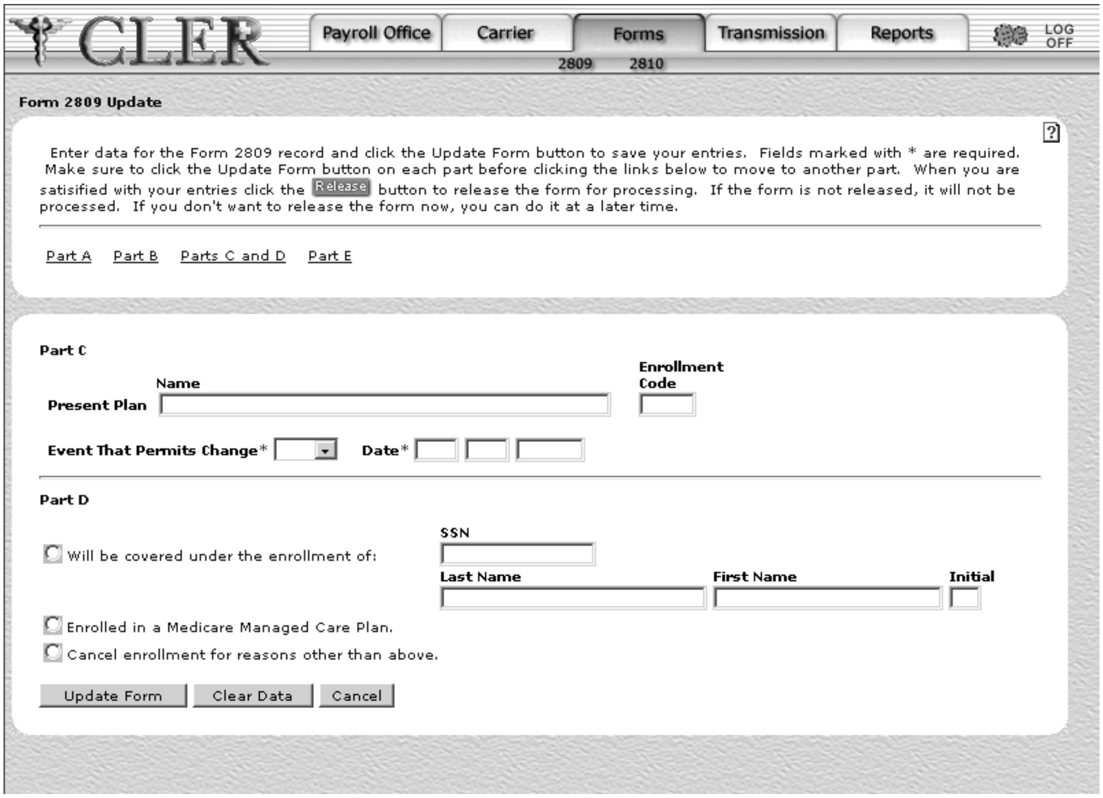


Figure 2:66. Form 2809 Update (Parts C and D) Page

- To update data on the Form 2809 Update (Part E) page, click **[Part E]**. The Form 2809 Update (Part E) page (**Figure 2:67**) is displayed. For more information, see the instructions in Step 14.
- To update another record, click **[Cancel]** to return to the Form 2809 Search Results page and click **[Update]** next to the applicable record.

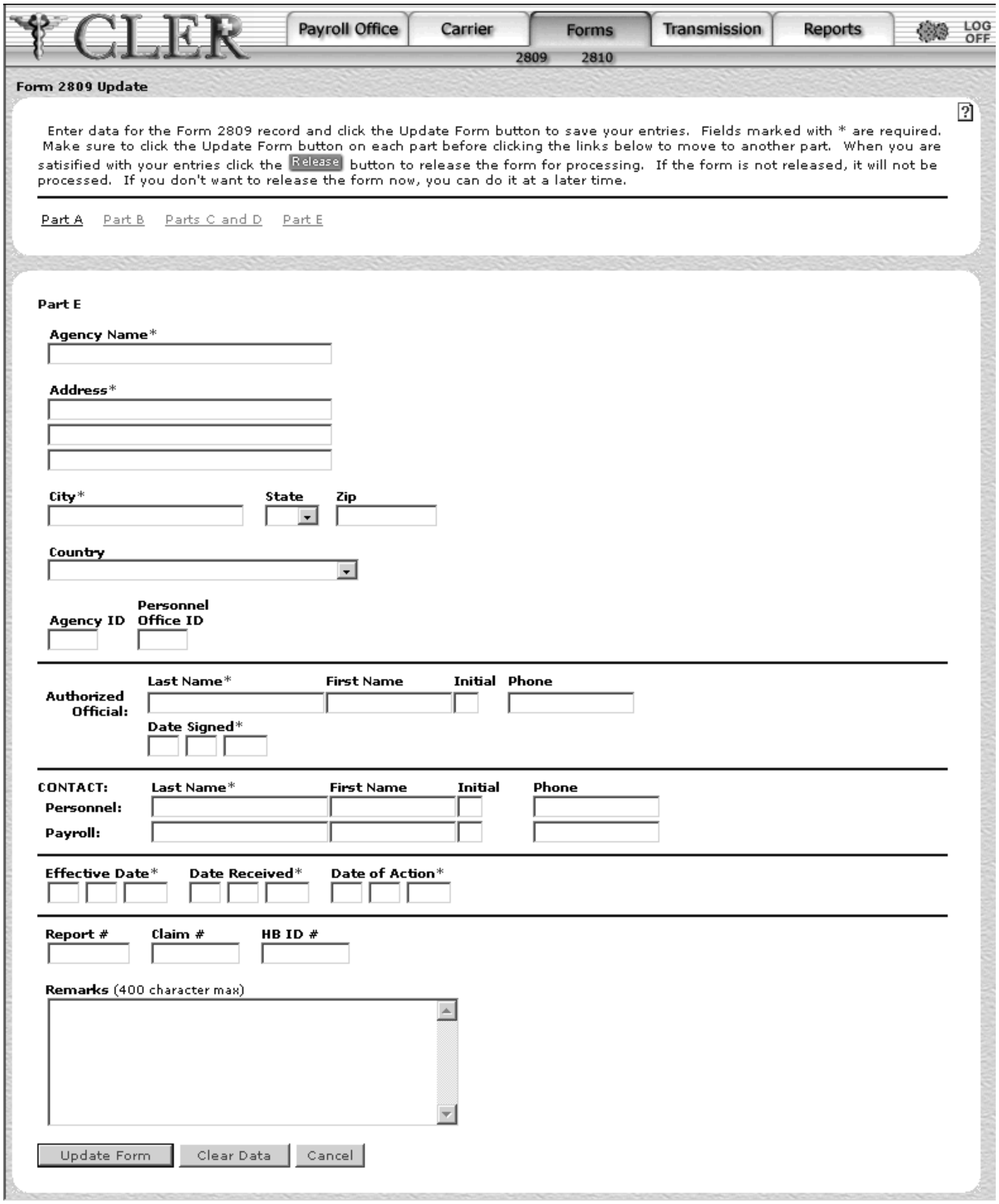


Figure 2:67. Form 2809 Update (Part E) Page

8. To update data on the Form 2809 Update (Part B) page (**Figure 2:65**), complete the applicable fields as indicated under **Form 2809 Update (Part B) Page Field Instructions** in **Part 3**.

9. Click **[Update Form]**. If no errors occur, a pop-up message is displayed to confirm the record has been updated.

10. Click **[OK]** to close the pop-up.

    After updating Part B, the following options are available:

- To update data on the Form 2809 Update (Part A) page, click **[Part A]**. The Form 2809 Update (Part A) page (**Figure 2:64**) is displayed. For more information, see the instructions in Step 5.
- To update data on the Form 2809 Update (Parts C and D) page, click **[Parts C and D]**. The Form 2809 Update (Parts C and D) page (**Figure 2:66**) is displayed. For more information, see the instructions in Step 11.
- To update data on the Form 2809 Update (Part E) page, click **[Part E]**. The Form 2809 Update (Part E) page (**Figure 2:67**) is displayed. For more information, see the instructions in Step 14.
- To update another record, click **[Cancel]** to return to the Form 2809 Search Results page and click **[Update]** next to the applicable record.

11. To update data on the Form 2809 Update (Parts C and D) page (**Figure 2:66**), complete the applicable fields as indicated under **Form 2809 Update (Parts C and D) Page Field Instructions** in **Part 3**.

12. Click **[Update Form]**. If no errors occur, a pop-up message is displayed to confirm the record has been updated.

13. Click **[OK]** to close the pop-up.

After updating Parts C and D, the following options are available:

- To update data on the Form 2809 Update (Part A) page, click **[Part A]**. The Form 2809 Update (Part A) page (**Figure 2:64**) is displayed. For more information, see the instructions in Step 5.
- To update data on the Form 2809 Update (Part B) page, click **[Part B]**. The Form 2809 Update (Part B) page (**Figure 2:65**) is displayed. For more information, see the instructions in Step 8.
- To update data on the Form 2809 Update (Part E) page, click **[Part E]**. The Form 2809 Update (Part E) page (**Figure 2:67**) is displayed. For more information, see the instructions in Step 14.
- To update another record, click **[Cancel]** to return to the Form 2809 Search Results page and click **[Update]** next to the applicable record.

14. To update data on the Form 2809 Update (Part E) page (**Figure 2:67**), complete the applicable fields as indicated under **Form 2809 Update (Part E) Page Field Instructions** in **Part 3**.

15. Click **[Update Form]**. If no errors occur, a pop-up message is displayed to confirm the record has been updated.

16. Click **[OK]** to close the pop-up.

After updating Part E, the following options are available:

- To update data on the Form 2809 Update (Part A) page, click **[Part A]**. The Form 2809 Update (Part A) page (**Figure 2:64**) is displayed. For more information, see the instructions in Step 5.

- To update data on the Form 2809 Update (Part B) page, click **[Part B]**. The Form 2809 Update (Part B) page (**Figure 2:65**) is displayed. For more information, see the instructions in Step 8.
- To update data on the Form 2809 Update (Parts C and D) page, click **[Parts C and D]**. The Form 2809 Update (Parts C and D) page (**Figure 2:66**) is displayed. For more information, see the instructions in Step 11.
- To update another record, click **[Cancel]** to return to the Form 2809 Search Results page and click **[Update]** next to the applicable record.

Releasing A 2809 Record

The Release function allows users to release 2809 records for processing.

To release a 2809 record:

1. Click **[Forms]** at the top of the CLER Main Menu (**Figure 1:2**). The Forms Main Page (**Figure 2:53**) is displayed.
2. Click **[2809]** at the top of the Forms Main Page. The Form 2809 page (**Figure 2:54**) is displayed.
3. Complete the fields on the Form 2809 page as indicated under **Form 2809 Page Field Instructions** in **Part 3** and click **[Submit]**. The Form 2809 Search Results page (**Figure 2:59**) is displayed. For field descriptions, see **Form 2809 Search Results Page Field Descriptions** in **Part 3**.
4. Click **[Release]** next to the applicable record. A pop-up message is displayed to confirm the record has been released.
5. Click **[OK]** to close the pop-up.

Canceling A 2809 Record

The Cancel function allows users to cancel the release of 2809 records.

To cancel the release of a 2809 record:

1. Click **[Forms]** at the top of the CLER Main Menu (**Figure 1:2**). The Forms Main Page (**Figure 2:53**) is displayed.
2. Click **[2809]** at the top of the Forms Main Page. The Form 2809 page (**Figure 2:54**) is displayed.
3. Complete the fields on the Form 2809 page as indicated under **Form 2809 Page Field Instructions** in **Part 3** and click **[Submit]**. The Form 2809 Search Results page (**Figure 2:59**) is displayed. For field descriptions, see **Form 2809 Search Results Page Field Descriptions** in **Part 3**.
4. Click **[Cancel]** next to the applicable record. A pop-up message is displayed to confirm the cancellation of the record's release.

5. Click **[OK]** to close the pop-up.

Maintaining 2810 Records

The 2810 option on the Forms Main Page (**Figure 2:53**) allows agency users to create a 2810 record in CLER. The CLER 2810 provides carriers with the information they need to update their enrollee records. With the proper access authority, forms may be created, deleted, printed, and released for processing. From the input that creates the 2810, CLER will generate a corrective action file to the carrier through the OPM Data Hub located in Macon, Georgia. It should be noted that this is an option. Agencies may also use other procedures such as fax, hardcopy, etc., to a coordinate corrective action with the carriers.

For more information, see:

Adding A 2810 Record
Viewing A 2810 Record
Updating A 2810 Record
Releasing A 2810 Record
Canceling A 2810 Record

Adding A 2810 Record

The Add function allows users to add 2810 records.

To add a 2810 record:

1. Click **[Forms]** at the top of the CLER Main Menu (**Figure 1:2**). The Forms Main Page (**Figure 2:53**) is displayed.
2. Click **[2810]** at the top of the Forms Main Page. The Form 2810 page (**Figure 2:68**) is displayed.

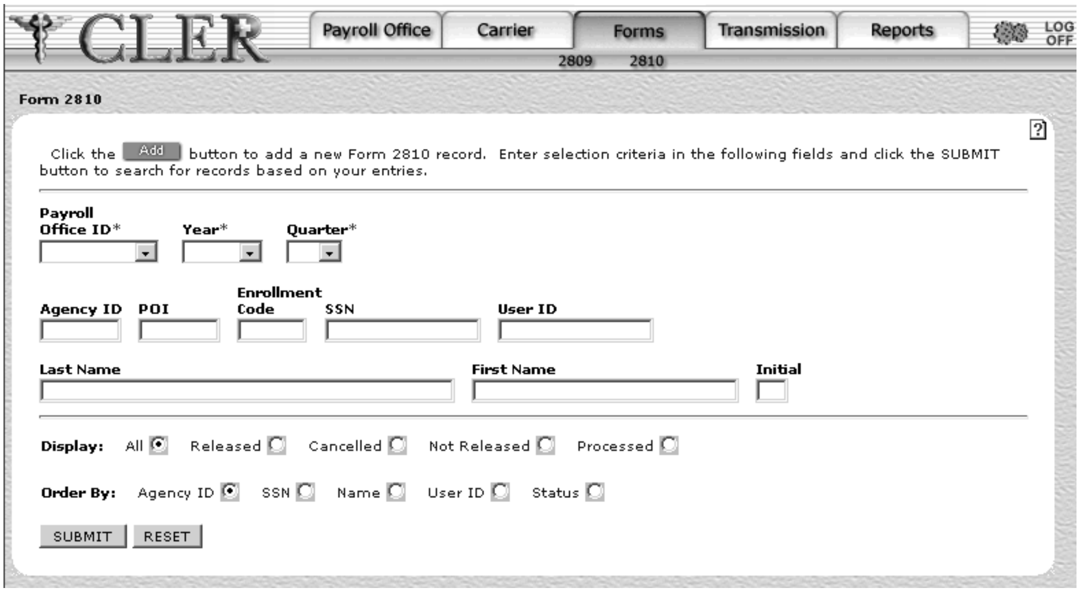


Figure 2:68. Form 2810 Page

3. Click **[Add]** on the Form 2810 page to display the Form 2810 Add (Part A) page (**Figure 2:69**).

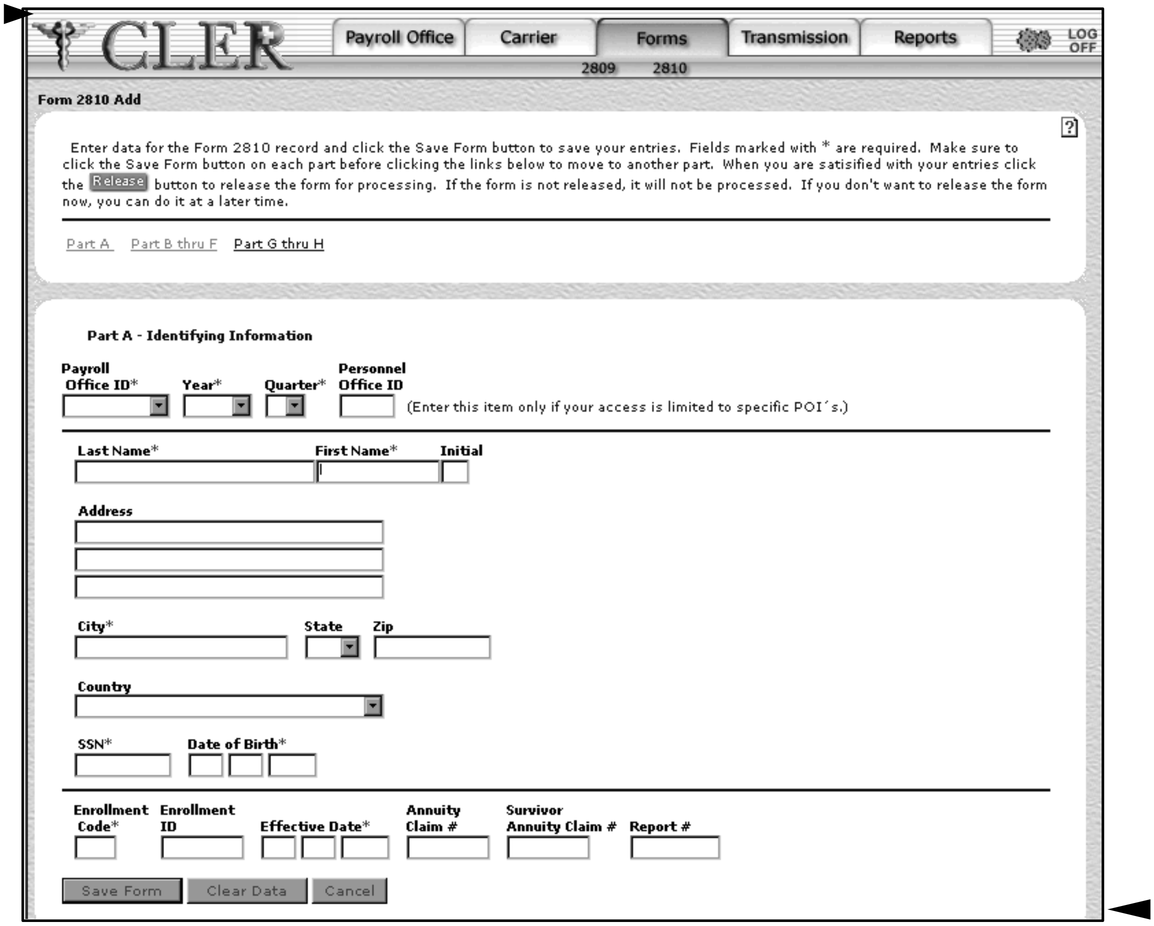


Figure 2:69. Form 2810 Add (Part A) Page

4. Complete the fields on the Form 2810 Add (Part A) page as indicated under **Form 2810 Add (Part A) Page Field Instructions** in **Part 3**.

5. Click **[Save Form]**. If no errors occur, a pop-up message is displayed to confirm the record has been added.

6. Click **[OK]** to close the pop-up.

7. Click **[Parts B thru F]** at the top of the Form 2810 Add (Part A) page. The Form 2810 Add (Parts B thru F) page (**Figure 2:70**) is displayed.

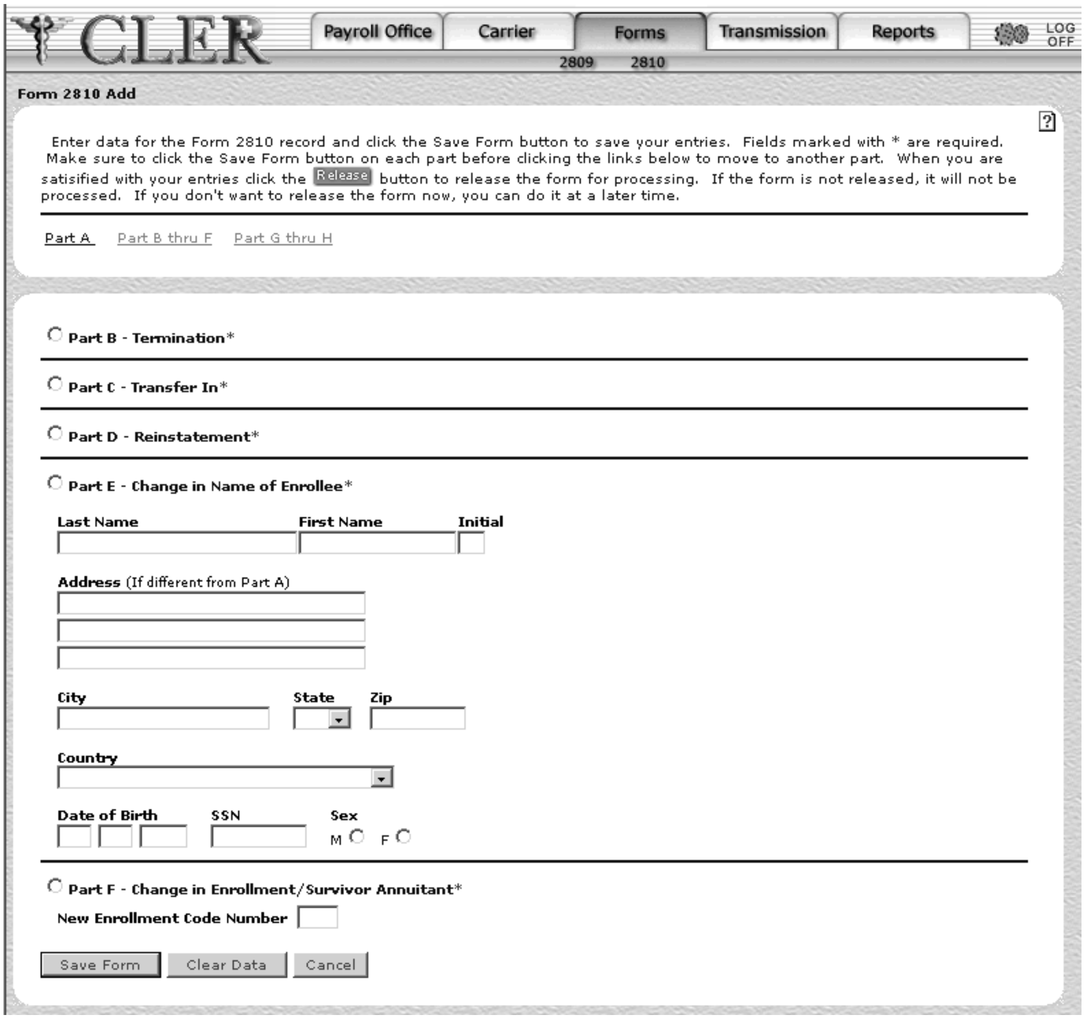


Figure 2:70. Form 2810 Add (Parts B thru F) Page

8. Complete the fields on the Form 2810 Add (Parts B thru F) page as indicated under **Form 2810 Add (Parts B thru F) Page Field Instructions** in **Part 3**.
9. Click **[Save Form]**. If no errors occur, a pop-up message is displayed to confirm the record has been added.
10. Click **[OK]** to close the pop-up.
11. Click **[Parts G and H]** at the top of the Form 2810 Add (Parts B thru F) page. The Form 2810 Add (Parts G and H) page (**Figure 2:71**) is displayed.

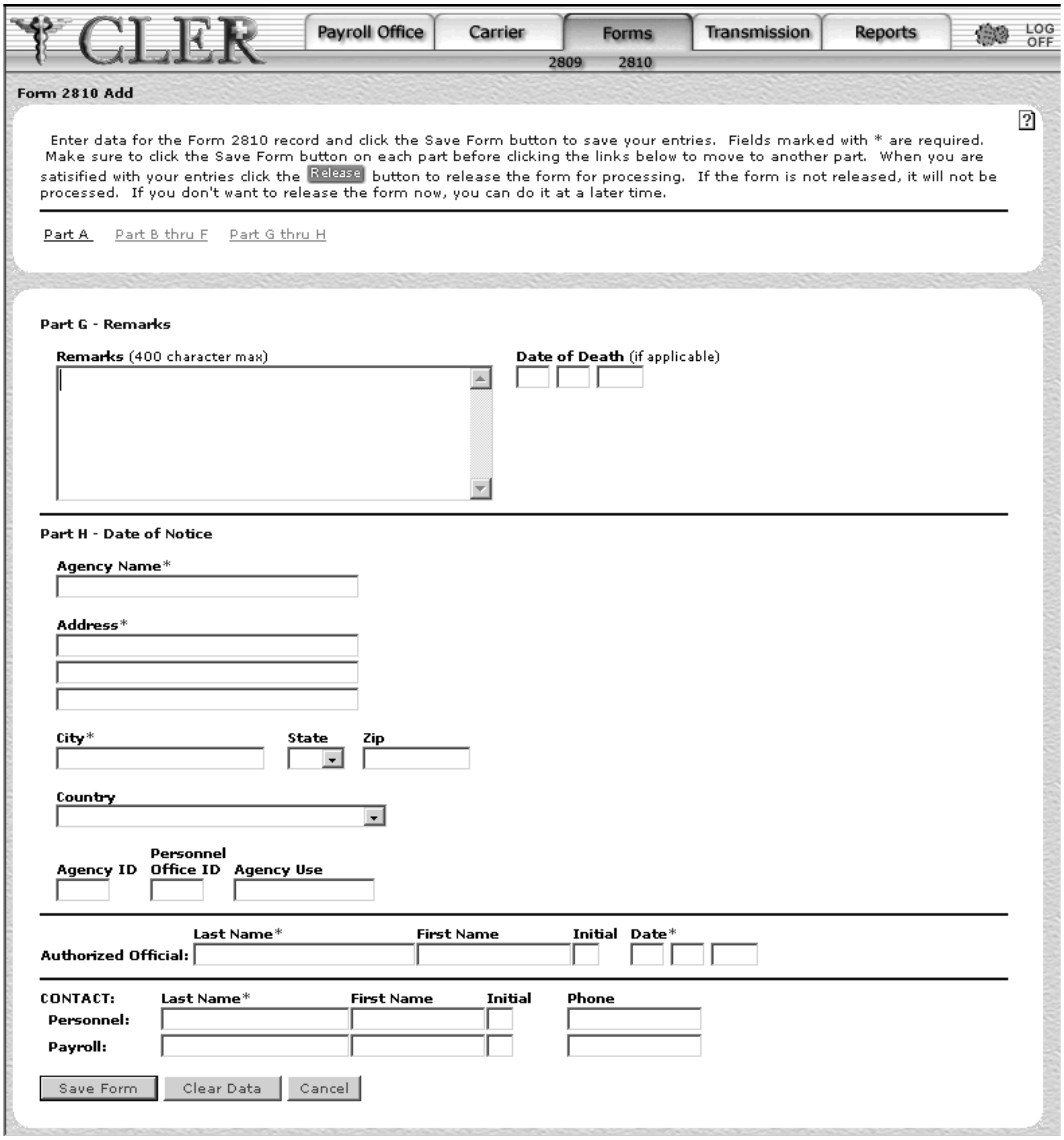


Figure 2:71. Form 2810 Add (Parts G and H) Page

12. Complete the fields on the Form 2810 Add (Parts G and H) page as indicated under **Form 2810 Add (Parts G and H) Page Field Instructions** in **Part 3**.

13. Click **[Save Form]**. If no errors occur, a pop-up message is displayed to confirm the record has been added.

14. Click **[OK]** to close the pop-up.

Viewing A 2810 Record

The View function allows users to view 2810 records.

To view a 2810 record:

1. Click **[Forms]** at the top of the CLER Main Menu (**Figure 1:2**). The Forms Main Page (**Figure 2:53**) is displayed.

2. Click **[2810]** at the top of the Forms Main Page. The Form 2810 page (**Figure 2:68**) is displayed.

3. Complete the fields on the Form 2810 page as indicated under **Form 2810 Page Field Instructions** in **Part 3** and click **[Submit]**. The Form 2810 Search Results page (**Figure 2:72**) is displayed. For field descriptions, see **Form 2810 Search Results Page Field Descriptions** in **Part 3**.

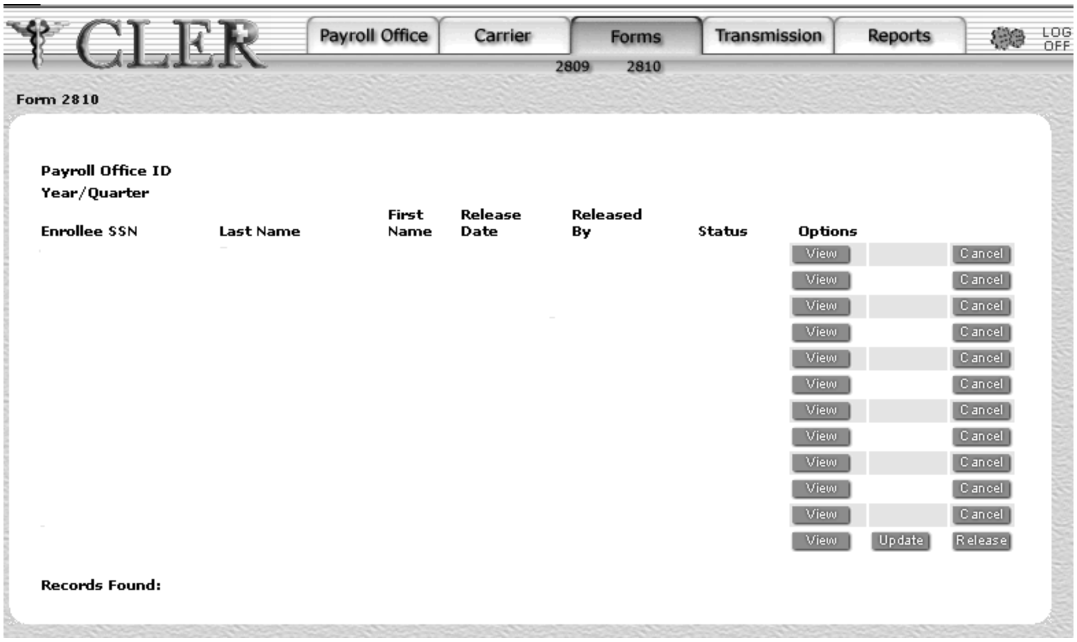
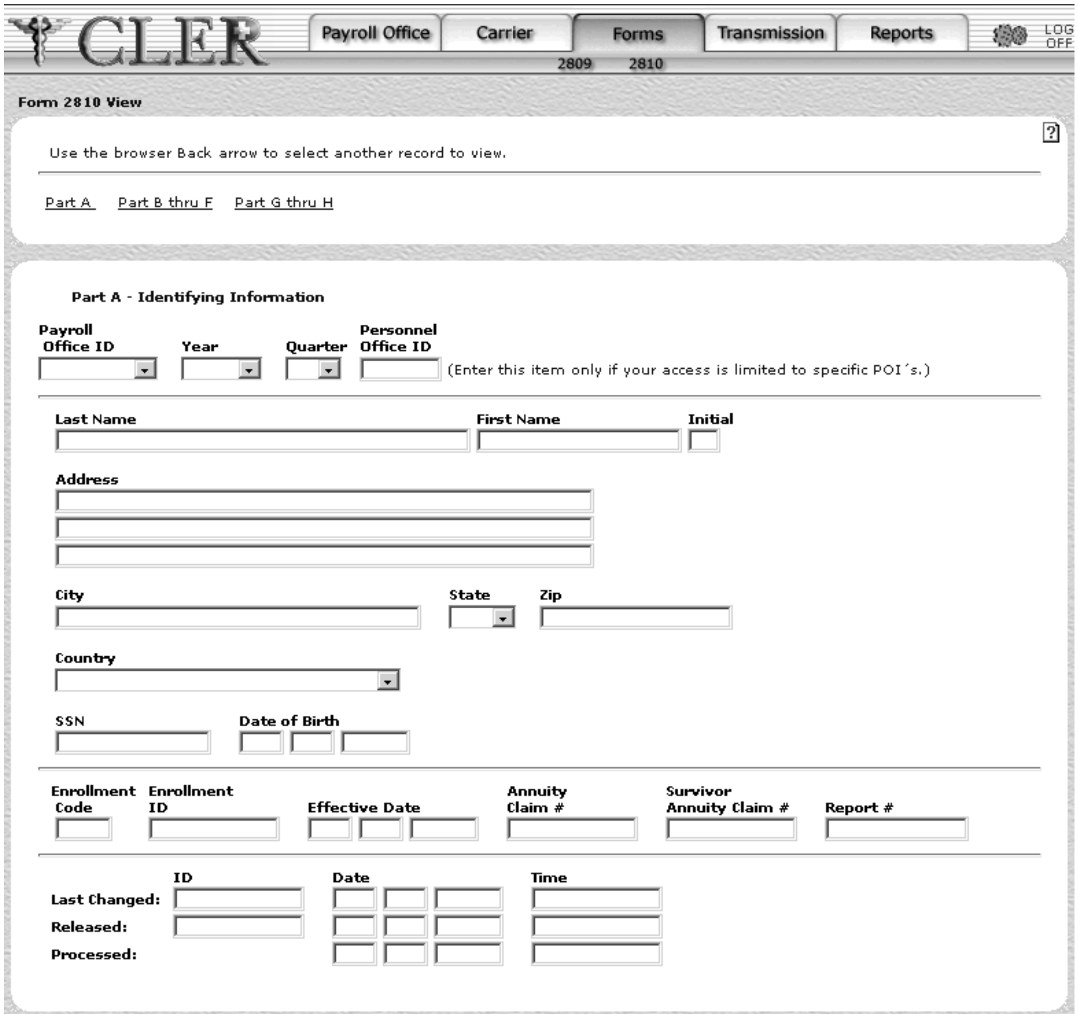


Figure 2:72. Form 2810 Search Results Page

4. Click **[View]** next to the applicable record. The Form 2810 View (Part A) page (**Figure 2:73**) is displayed. For field descriptions, see **Form 2810 View (Part A) Page Field Descriptions** in **Part 3**.


CLER | Payroll Office | Carrier | Forms | Transmission | Reports | LOG OFF
2809 2810

Form 2810 View

Use the browser Back arrow to select another record to view.

Part A Part B thru F Part G thru H

Part A - Identifying Information

Payroll Office ID | Year | Quarter | Personnel Office ID (Enter this item only if your access is limited to specific POI´s.)

Last Name | First Name | Initial

Address

City | State | Zip

Country

SSN | Date of Birth

Enrollment Code | Enrollment ID | Effective Date | Annuity Claim # | Survivor Annuity Claim # | Report #

ID | Date | Time

Last Changed:

Released:

Processed:

Figure 2:73. Form 2810 View (Part A) Page

5. Click **[Parts B thru F]** to display the Form 2810 View (Parts B thru F) page (**Figure 2:74**). For field descriptions, see **Form 2810 View (Parts B thru F) Page Field Descriptions** in **Part 3**.

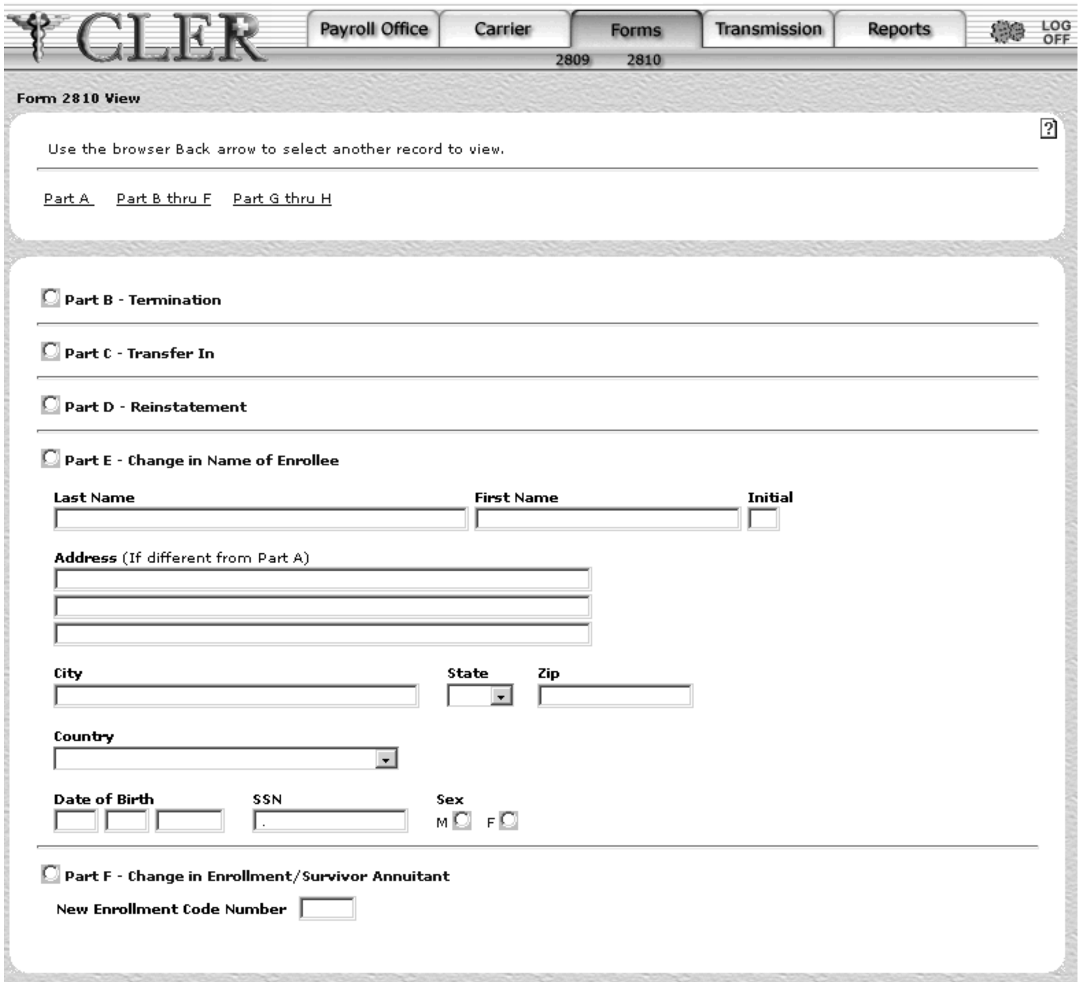


Figure 2:74. Form 2810 View (Parts B thru F) Page

6. Click **[Parts G and H]** to display the Form 2810 View (Parts G and H) page (**Figure 2:75**). For field descriptions, see **Form 2810 View (Parts G and H) Page Field Descriptions** in **Part 3**.

   Note: To view another record, click your browser's Back button to return to the Form 2810 Search Results page and click **[View]** next to the applicable record.

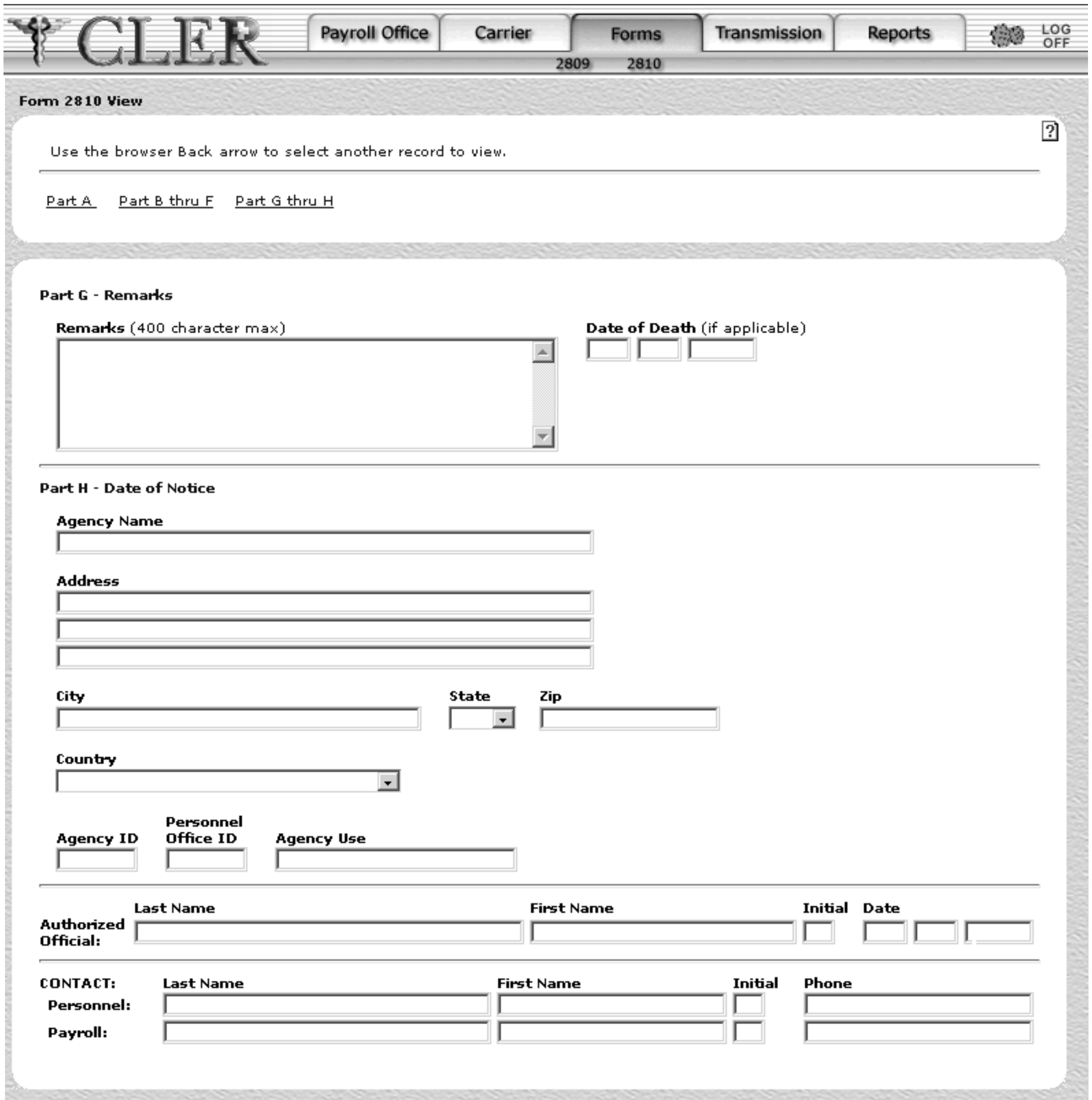


Figure 2:75. Form 2810 View (Parts G and H) Page

Updating A 2810 Record

The Update function allows users to update 2810 records.

To update a 2810 record:

1. Click **[Forms]** at the top of the CLER Main Menu (**Figure 1:2**). The Forms Main Page (**Figure 2:53**) is displayed.

2. Click **[2810]** at the top of the Forms Main Page. The Form 2810 page (**Figure 2:68**) is displayed.

3. Complete the fields on the Form 2810 page as indicated under **Form 2810 Page Field Instructions** in **Part 3** and click **[Submit]**. The Form 2810 Search Results page (**Figure 2:72**) is displayed. For field descriptions, see **Form 2810 Search Results Page Field Descriptions** in **Part 3**.

4. Click **[Update]** next to the applicable record. The Form 2810 Update (Part A) page (**Figure 2:76**) is displayed.

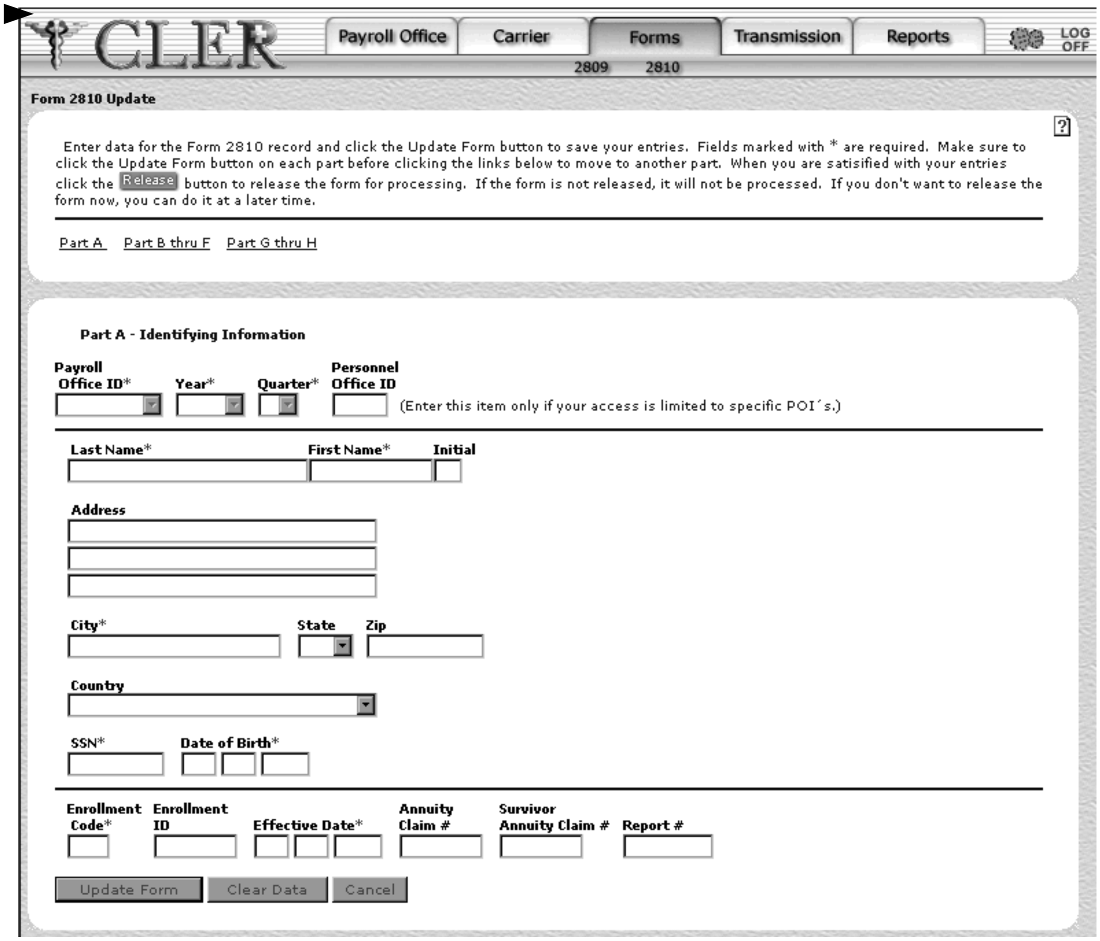


Figure 2:76. Form 2810 Update (Part A) Page

5. To update data on the Form 2810 Update (Part A) page, complete the applicable fields as indicated under **Form 2810 Update (Part A) Page Field Instructions** in **Part 3**.

6. Click **[Update Form]**. If no errors occur, a pop-up message is displayed to confirm the record has been updated.

7. Click **[OK]** to close the pop-up.

After updating Part A, the following options are available:

- To update data on the Form 2810 Update (Parts B thru F) page, click **[Parts B thru F]**. The Form 2810 Update (Parts B thru F) page (**Figure 2:77**) is displayed. For more information, see the instructions in Step 8.

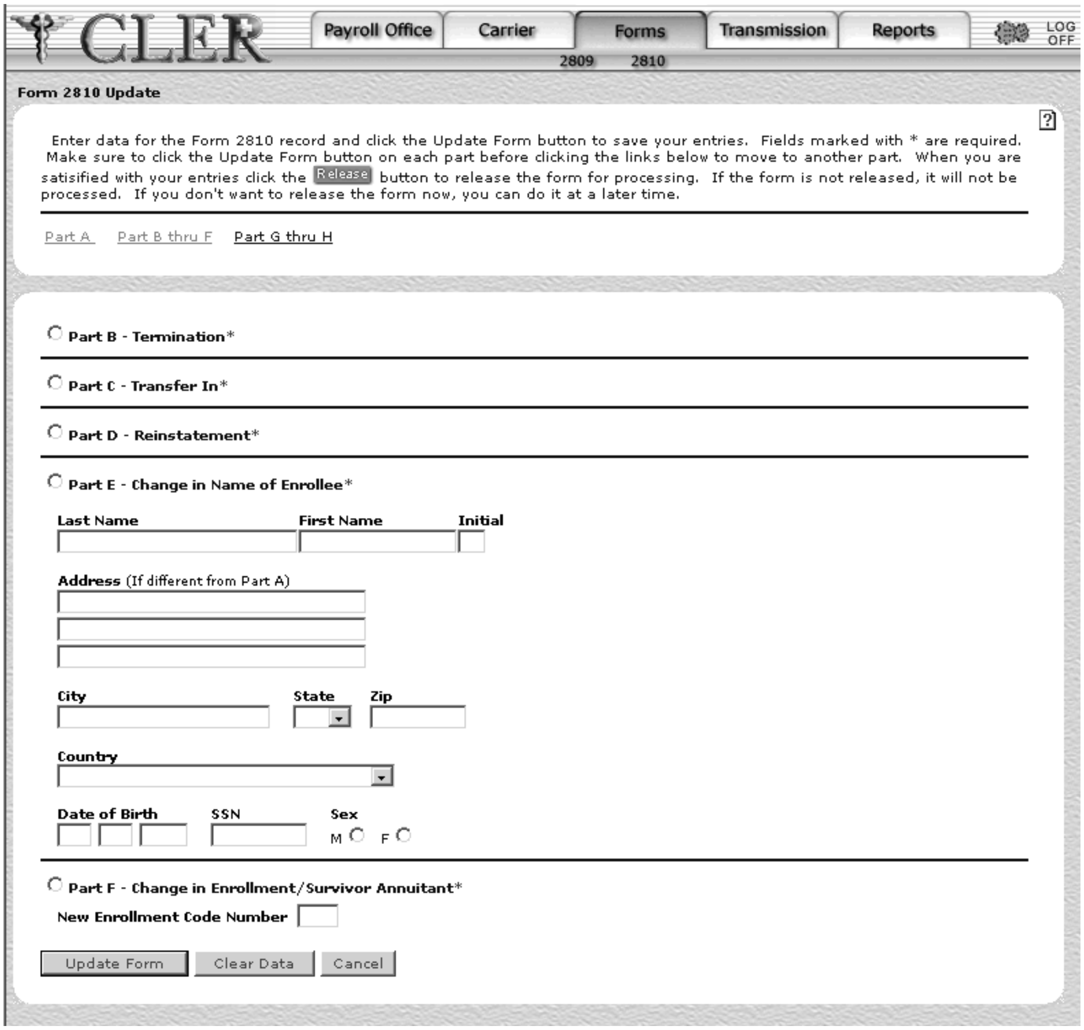


Figure 2:77. Form 2810 Update (Parts B thru F) Page

- To update data on the Form 2810 Update (Parts G and H) page, click **[Parts G and H]**. The Form 2810 Update (Parts G and H) page (**Figure 2:78**) is displayed. For more information, see the instructions in Step 11.
- To update another record, click **[Cancel]** to return to the Form 2810 Search Results page and click **[Update]** next to the applicable record.

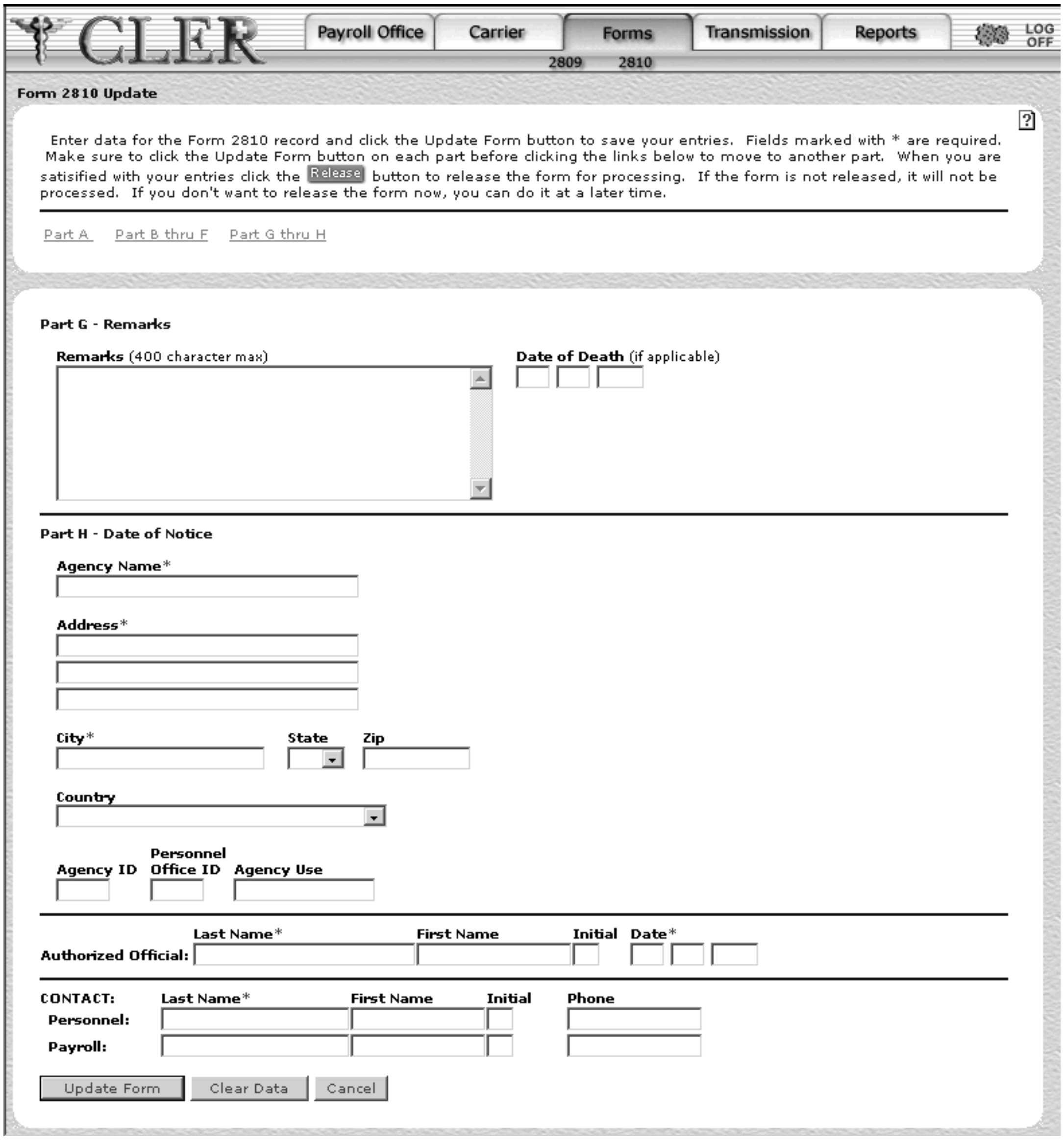


Figure 2:78. Form 2810 Update (Parts G and H) Page

8. To update data on the Form 2810 Update (Parts B thru F) page (**Figure 2:77**), complete the applicable fields as indicated under **Form 2810 Update (Parts B thru F) Page Field Instructions** in **Part 3**.

9. Click **[Update Form]**. If no errors occur, a pop-up message is displayed to confirm the record has been updated.

10. Click **[OK]** to close the pop-up.

    After updating Parts B thru F, the following options are available:

    - To update data on the Form 2810 Update (Part A) page, click **[Part A]**. The Form 2810 Update (Part A) page (**Figure 2:76**) is displayed. For more information, see the instructions in Step 5.

- To update data on the Form 2810 Update (Parts G and H) page, click **[Parts G and H]**. The Form 2810 Update (Parts G and H) page (**Figure 2:78**) is displayed. For more information, see the instructions in Step 11.
- To update another record, click **[Cancel]** to return to the Form 2810 Search Results page and click **[Update]** next to the applicable record.

11. To update data on the Form 2810 Update (Parts G and H) page (**Figure 2:78**), complete the applicable fields as indicated under **Form 2810 Update (Parts G and H) Page Field Instructions** in **Part 3**.

12. Click **[Update Form]**. If no errors occur, a pop-up message is displayed to confirm the record has been updated.

13. Click **[OK]** to close the pop-up.

After updating Parts G and H, the following options are available:

- To update data on the Form 2810 Update (Part A) page, click **[Part A]**. The Form 2810 Update (Part A) page (**Figure 2:76**) is displayed. For more information, see the instructions in Step 5.
- To update data on the Form 2810 Update (Parts B thru F) page, click **[Parts B thru F]**. The Form 2810 Update (Parts B thru F) page (**Figure 2:77**) is displayed. For more information, see the instructions in Step 8.
- To update another record, click **[Cancel]** to return to the Form 2810 Search Results page and click **[Update]** next to the applicable record.

Releasing A 2810 Record

The Release function allows users to release 2810 records for processing.

To release a 2810 record:

1. Click **[Forms]** at the top of the CLER Main Menu (**Figure 1:2**). The Forms Main Page (**Figure 2:53**) is displayed.

2. Click **[2810]** at the top of the Forms Main Page. The Form 2810 page (**Figure 2:68**) is displayed.

3. Complete the fields on the Form 2810 page as indicated under **Form 2810 Page Field Instructions** in **Part 3** and click **[Submit]**. The Form 2810 Search Results page (**Figure 2:72**) is displayed. For field descriptions, see **Form 2810 Search Results Page Field Descriptions** in **Part 3**.

4. Click **[Release]** next to the applicable record. A pop-up message is displayed to confirm the record has been released.

5. Click **[OK]** to close the pop-up.

Canceling A 2810 Record

The Cancel function allows users to cancel the release of 2810 records.

To cancel the release of a 2810 record:

1. Click **[Forms]** at the top of the CLER Main Menu (**Figure 1:2**). The Forms Main Page (**Figure 2:53**) is displayed.

2. Click **[2810]** at the top of the Forms Main Page. The Form 2810 page (**Figure 2:68**) is displayed.

3. Complete the fields on the Form 2810 page (**Figure 2:68**) as indicated under **Form 2810 Page Field Instructions** in **Part 3** and click **[Submit]**. The Form 2810 Search Results page (**Figure 2:72**) is displayed. For field descriptions, see **Form 2810 Search Results Page Field Descriptions** in **Part 3**.

4. Click **[Cancel]** next to the applicable record. A pop-up message is displayed to confirm the cancellation of the record's release.

5. Click **[OK]** to close the pop-up.

Maintaining Transmission Records

The Transmission option allows users to view and maintain transmission files. With proper access authority, transmission files may be added, released, or canceled.

This section presents more information under the following topics:

[Maintaining Online Entry Records]

Maintaining Online Entry Records

The Online Entry option on the Transmission Main Page (**Figure 2:79**) allows users (payroll offices only) to enter enrollment data online to submit the data to the CLER reconciliation process as a transmission file. This option is useful for agencies with few enrollment records.

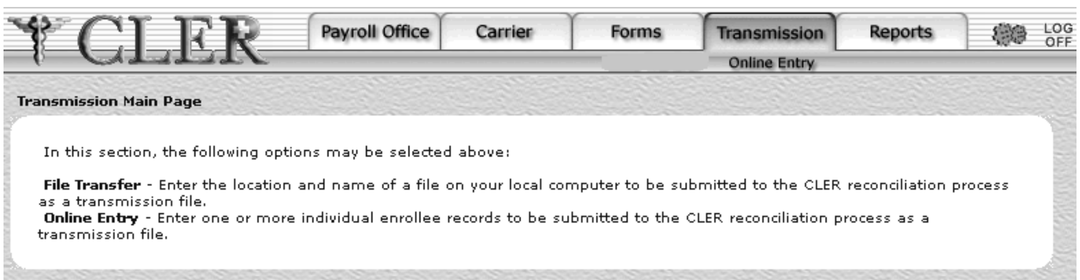


Figure 2:79. Transmission Main Page

For more information, see:

[Adding An Online Entry Record]
[Viewing An Online Entry Record]
[Viewing An Online Entry Enrollee Record]
[Updating An Online Entry Enrollee Record]
[Deleting An Online Entry Enrollee Record]
[Adding An Online Entry Enrollee Record]
[Updating An Online Entry Record]
[Releasing An Online Entry Record]
[Canceling An Online Entry Record]

Adding An Online Entry Record

The Add function allows users to add transmission online entry records.

To add an online entry record:

1. Click **[Transmission]** at the top of the CLER Main Menu (**Figure 1:2**). The Transmission Main Page (**Figure 2:79**) is displayed.
2. Click **[Online Entry]** at the top of the Transmission Main Page. The Transmission Online Entry page (**Figure 2:80**) is displayed.

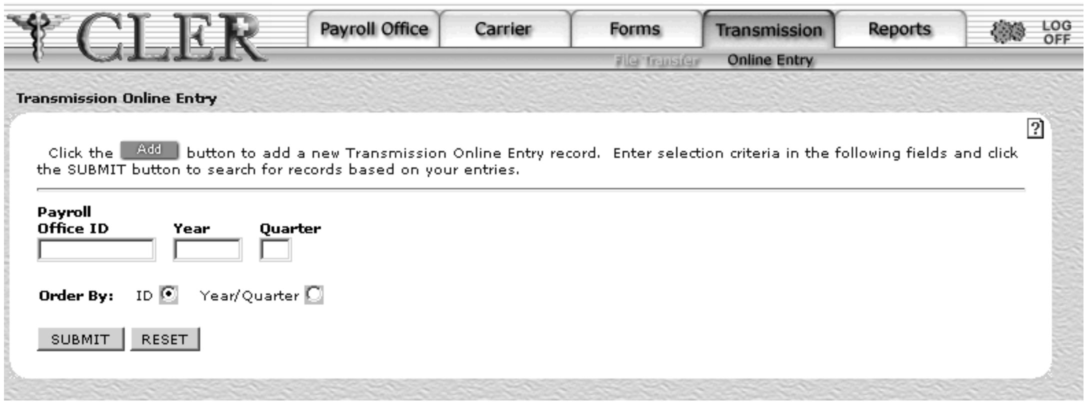


Figure 2:80. Transmission Online Entry Page

3. Click **[Add]** on the Transmission Online Entry page to display the Transmission Online Entry Add page (**Figure 2:81**).

Figure 2:81. Transmission Online Entry Add Page

4. Complete the fields on the Transmission Online Entry Add page as indicated under **Transmission Online Entry Add Page Field Instructions** in **Part 3**

5. Click **[Add Record]**. If no errors occur, a pop-up message is displayed to confirm the record has been added.

6. Click **[OK]** to close the pop-up.

   Note: To add another record, click **[Cancel]** to refresh the Transmission Online Entry Add page and complete the fields for the new record.

Viewing An Online Entry Record

The View function allows users to view transmission online entry records.

To view an online entry record:

1. Click **[Transmission]** at the top of the CLER Main Menu (**Figure 1:2**). The Transmission Main Page (**Figure 2:79**) is displayed.

2. Click **[Online Entry]** at the top of the Transmission Main Page. The Transmission Online Entry page (**Figure 2:80**) is displayed.

3. Complete the fields on the Transmission Online Entry page as indicated under **Transmission Online Entry Page Field Instructions** in **Part 3** and click **[Submit]**. The Transmission Online Entries Search Results page (**Figure 2:82**) is displayed. For field descriptions, see **Transmission Online Entries Search Results Page Field Descriptions** in **Part 3**.

   Note: The Transmission Online Entries Search Results page allows agencies to reuse the enrollment data from a previous quarter for the online transmission of enrollment data in the current quarter. To reuse a previous quarter's enrollment data, complete the Year and Quarter fields as indicated under **Transmission Online Entries Search Results Page Field Descriptions** in **Part 3** and select the radio button in the Select field located next to the applicable quarter's enrollment data record.

   After selecting the applicable radio button, the following options are available:

   - To refresh the page, click **[Reset]**.
   - To use the selected quarter's enrollment data record for the online transmission to CLER, click **[Submit]**. If no errors occur, a pop message is displayed to confirm the record has been added. Click **[OK]** to close the pop-up.

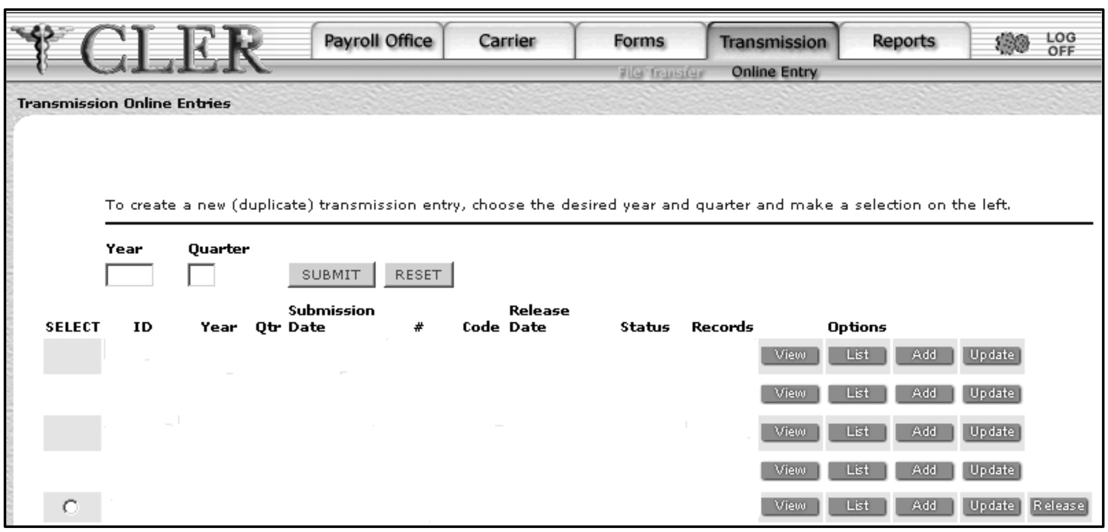


Figure 2:82. Transmission Online Entries Search Results Page

4. Click **[View]** next to the applicable record. The Transmission Online Entry View page (**Figure 2:83**) is displayed. For field descriptions, see **Transmission Online Entry View Page Field Descriptions** in **Part 3**.

   Note: To view another record, click your browser's Back button to return to the Transmission Online Entries Search Results page and click **[View]** next to the applicable record.

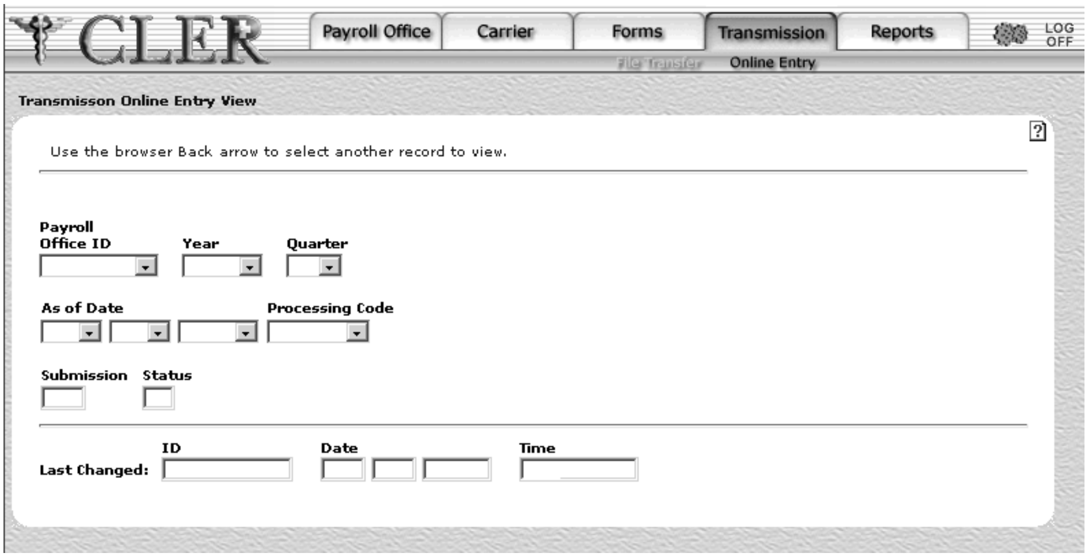


Figure 2:83. Transmission Online Entry View Page

Viewing An Online Entry Enrollee Record

The View function allows users to view online entry enrollee records.

To view an online entry enrollee record:

1. Click **[Transmission]** at the top of the CLER Main Menu (**Figure 1:2**). The Transmission Main Page (**Figure 2:79**) is displayed.
2. Click **[Online Entry]** at the top of the Transmission Main Page. The Transmission Online Entry page (**Figure 2:80**) is displayed.
3. Complete the fields on the Transmission Online Entry page as indicated under **Transmission Online Entry Page Field Instructions** in **Part 3** and click **[Submit]**. The Transmission Online Entries Search Results page (**Figure 2:82**) is displayed. For field descriptions, see **Transmission Online Entries Search Results Page Field Descriptions** in **Part 3**.
4. Click **[List]** next to the applicable record. The Transmission Online Entry Enrollees Search Results page (**Figure 2:84**) is displayed. For field descriptions, see **Transmission Online Entry Enrollees Search Results Page Field Descriptions** in **Part 3**.

Figure 2:84. Transmission Online Entry Enrollees Search Results Page

5. Click **[View]** next to the applicable record on the Transmission Online Entry Enrollees Search Results page. The Transmission Online Entry Enrollees View page (**Figure 2:85**) is displayed. For field descriptions, see **Transmission Online Entry Enrollees View Page Field Descriptions** in **Part 3**.

   Note: To view another record, click your browser's Back button to return to the Transmission Online Entry Enrollees Search Results page and click **[View]** next to the applicable record.

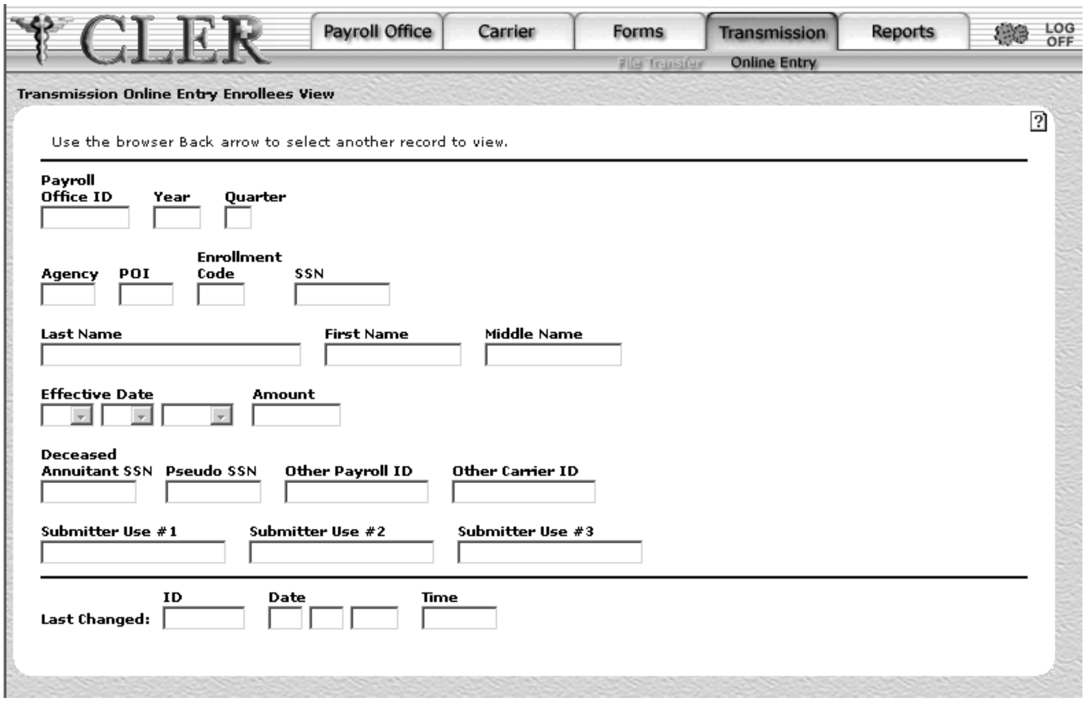


Figure 2:85. Transmission Online Entry Enrollees View Page

Updating An Online Entry Enrollee Record

The Update function allows users to update online entry enrollee records.

To update an online entry enrollee record:

1. Click **[Transmission]** at the top of the CLER Main Menu (**Figure 1:2**). The Transmission Main Page (**Figure 2:79**) is displayed.

2. Click **[Online Entry]** at the top of the Transmission Main Page. The Transmission Online Entry page (**Figure 2:80**) is displayed.

3. Complete the fields on the Transmission Online Entry page as indicated under **Transmission Online Entry Page Field Instructions** in **Part 3** and click **[Submit]**. The Transmission Online Entries Search Results page (**Figure 2:82**) is displayed. For field descriptions, see **Transmission Online Entries Search Results Page Field Descriptions** in **Part 3**.

4. Click **[List]** next to the applicable record. The Transmission Online Entry Enrollees Search Results page (**Figure 2:84**) is displayed. For field descriptions, see

Transmission Online Entry Enrollees Search Results Page Field Descriptions in **Part 3**.

5. Click **[Update]** next to the applicable record on the Transmission Online Entry Enrollees Search Results page (**Figure 2:84**). The Transmission Online Entry Enrollees Update page (**Figure 2:86**) is displayed.

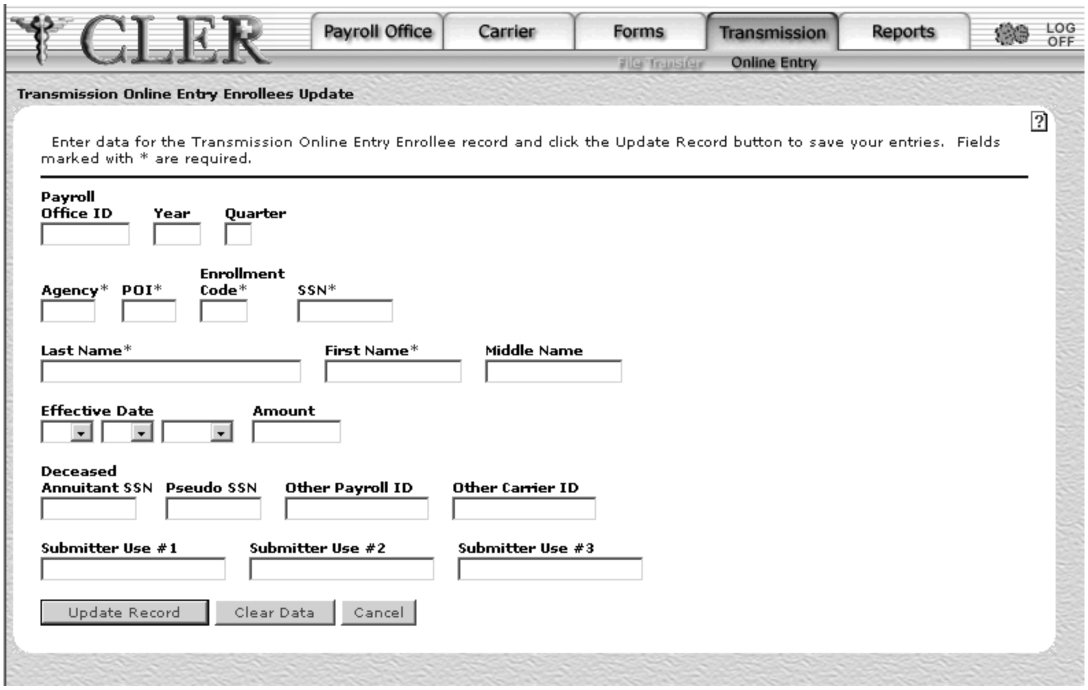


Figure 2:86. Transmission Online Entry Enrollees Update Page

6. Complete the fields on the Transmission Online Entry Enrollees Update page as indicated under **Transmission Online Entry Enrollees Update Page Field Instructions** in **Part 3**.

7. Click **[Update Record]**. If no errors occur, a pop-up message is displayed to confirm the record has been updated.

8. Click **[OK]** to close the pop-up.

   Note: To update another record, click **[Cancel]** to return to the Transmission Online Entry Enrollees Search Results page and click **[Update]** next to the applicable record.

Deleting An Online Entry Enrollee Record

The Delete function allows users to delete online entry enrollee records.

To delete an online entry enrollee record:

1. Click **[Transmission]** at the top of the CLER Main Menu (**Figure 1:2**). The Transmission Main Page (**Figure 2:79**) is displayed.

2. Click **[Online Entry]** at the top of the Transmission Main Page. The Transmission Online Entry page (**Figure 2:80**) is displayed.

3. Complete the fields on the Transmission Online Entry page as indicated under **Transmission Online Entry Page Field Instructions** in **Part 3** and click **[Submit]**. The Transmission Online Entries Search Results page (**Figure 2:82**) is displayed. For field descriptions, see **Transmission Online Entries Search Results Page Field Descriptions** in **Part 3**.

4. Click **[List]** next to the applicable record. The Transmission Online Entry Enrollees Search Results page (**Figure 2:84**) is displayed. For field descriptions, see **Transmission Online Entry Enrollees Search Results Page Field Descriptions** in **Part 3**.

5. Click **[Delete]** next to the applicable record on the Transmission Online Entry Enrollees Search Results page. A pop-up message is displayed asking the user to approve the deletion.

6. Click **[OK]** to delete the record and close the pop-up.

Adding An Online Entry Enrollee Record

The Add function allows users to add online entry enrollee records.

To add an online entry enrollee record:

1. Click **[Transmission]** at the top of the CLER Main Menu (**Figure 1:2**). The Transmission Main Page (**Figure 2:79**) is displayed.

2. Click **[Online Entry]** at the top of the Transmission Main Page. The Transmission Online Entry page (**Figure 2:80**) is displayed.

3. Complete the fields on the Transmission Online Entry page as indicated under **Transmission Online Entry Page Field Instructions** in **Part 3** and click **[Submit]**. The Transmission Online Entries Search Results page (**Figure 2:82**) is displayed. For field descriptions, see **Transmission Online Entries Search Results Page Field Descriptions** in **Part 3**.

4. Click **[Add]** next to the applicable record on the Transmission Online Entries Search Results page (**Figure 2:82**). The Transmission Online Entry Enrollees Add page (**Figure 2:87**) is displayed.

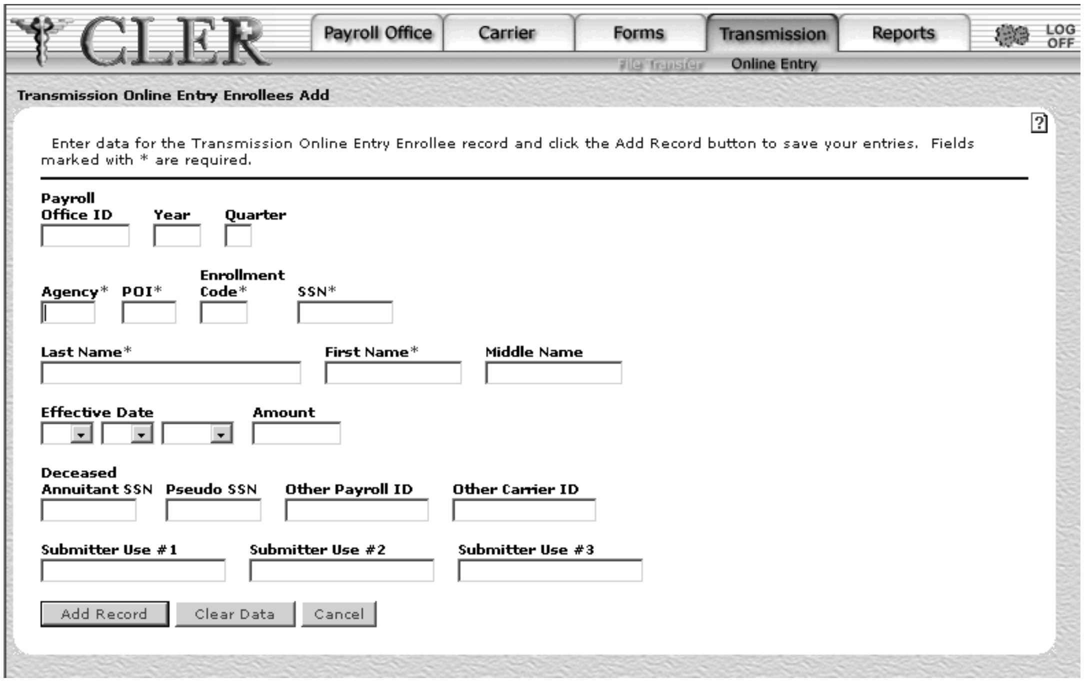


Figure 2:87. Transmission Online Entry Enrollees Add Page

5. Complete the fields on the Transmission Online Entry Enrollees Add page as indicated under **Transmission Online Entry Enrollees Add Page Field Instructions** in **Part 3**.

6. Click **[Add Record]**. If no errors occur, a pop-up message is displayed to confirm the record has been added.

7. Click **[OK]** to close the pop-up.

   Note: To add another record, click **[Cancel]** to refresh the Transmission Online Entry Enrollees Add page and complete the fields for the new record.

Updating An Online Entry Record

The Update function allows users to update online entry records.

To update an online entry record:

1. Click **[Transmission]** at the top of the CLER Main Menu (**Figure 1:2**). The Transmission Main Page (**Figure 2:79**) is displayed.

2. Click **[Online Entry]** at the top of the Transmission Main Page. The Transmission Online Entry page (**Figure 2:80**) is displayed.

3. Complete the fields on the Transmission Online Entry page as indicated under **Transmission Online Entry Page Field Instructions** in **Part 3** and click **[Submit]**. The Transmission Online Entries Search Results page (**Figure 2:82**) is displayed. For field descriptions, see **Transmission Online Entries Search Results Page Field Descriptions** in **Part 3**.

4. Click **[Update]** next to the applicable record on the Transmission Online Entries Search Results page. The Transmission Online Entry Update page (**Figure 2:88**) is displayed.

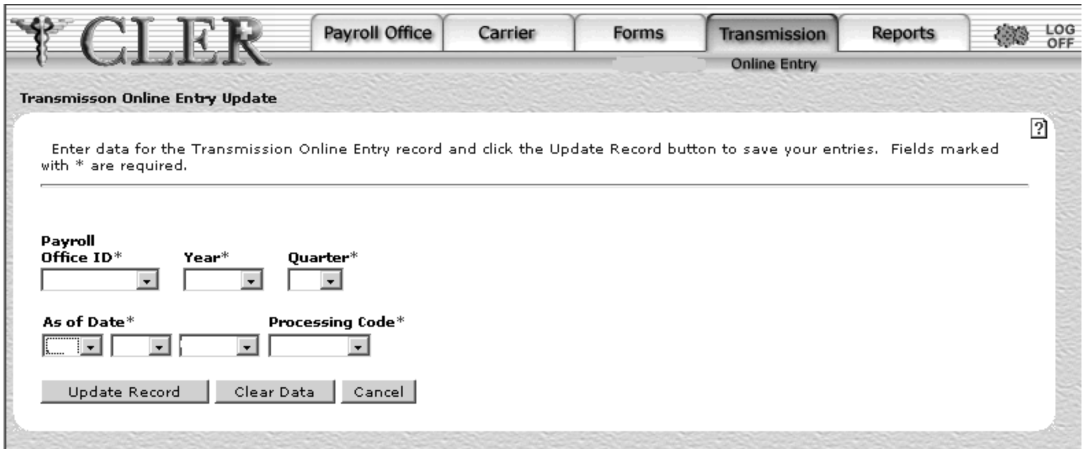


Figure 2:88. Transmission Online Entry Update Page

5. Complete the applicable fields on the Transmission Online Entry Update page as indicated under **Transmission Online Entry Update Page Field Instructions** in **Part 3**.

6. Click **[Update Record]**. If no errors occur, a pop-up message is displayed to confirm the record has been updated.

7. Click **[OK]** to close the pop-up.

   Note: To update another record, click **[Cancel]** to return to the Transmission Online Entries Search Results page and click **[Update]** next to the applicable record.

Releasing An Online Entry Record

The Release function allows users to release online entry records for transmission to CLER.

To release an online entry record:

1. Click **[Transmission]** at the top of the CLER Main Menu (**Figure 1:2**). The Transmission Main Page (**Figure 2:79**) is displayed.

2. Click **[Online Entry]** at the top of the Transmission Main Page. The Transmission Online Entry page (**Figure 2:80**) is displayed.

3. Complete the fields on the Transmission Online Entry page as indicated under **Transmission Online Entry Page Field Instructions** in **Part 3** and click **[Submit]**. The Transmission Online Entries Search Results page (**Figure 2:82**) is displayed. For field descriptions, see **Transmission Online Entries Search Results Page Field Descriptions** in **Part 3**.

   Note: The **[Release]** button is only displayed next to online entry records that contain enrollee records.

4. Click **[Release]** next to the applicable entry record. A pop-up message is displayed to confirm the record has been released.

5. Click **[OK]** to close the pop-up.

CLER Processing Instructions

Canceling An Online Entry Record

The Cancel function allows users to cancel the transmission of online entry records. Canceled records will be held and may be viewed or released at a later time within that reconciliation year and quarter.

To cancel the transmission of an online entry record:

1. Click **[Transmission]** at the top of the CLER Main Menu (**Figure 1:2**). The Transmission Main Page (**Figure 2:79**) is displayed.

2. Click **[Online Entry]** at the top of the Transmission Main Page. The Transmission Online Entry page (**Figure 2:80**) is displayed.

3. Complete the fields on the Transmission Online Entry page as indicated under **Transmission Online Entry Page Field Instructions** in **Part 3** and click **[Submit]**. The Transmission Online Entries Search Results page (**Figure 2:82**) is displayed. For field descriptions, see **Transmission Online Entries Search Results Page Field Descriptions** in **Part 3**.

   Note: The **[Cancel]** button is only displayed next to online entry records that contain enrollee records that have been released for transmission to CLER.

4. Click **[Cancel]** next to the applicable online entry record. A pop-up message is displayed to confirm the transmission of the record has been canceled.

5. Click **[OK]** to close the pop-up.

Viewing Reports

The Reports option allows users to create customized reports based on information in CLER.

This section presents more information under the following topics:

Viewing Payroll Discrepancy Listing (Report 1)

The Payroll Discrepancy Listing (Report 1) option on the Reports Selection page (**Figure 2:89**) allows users to view the Payroll Discrepancy Listing report. This report provides a listing by payroll office identification number of payroll office and carrier enrollee records that match, as well as records marked with payroll office warning and discrepancy codes.

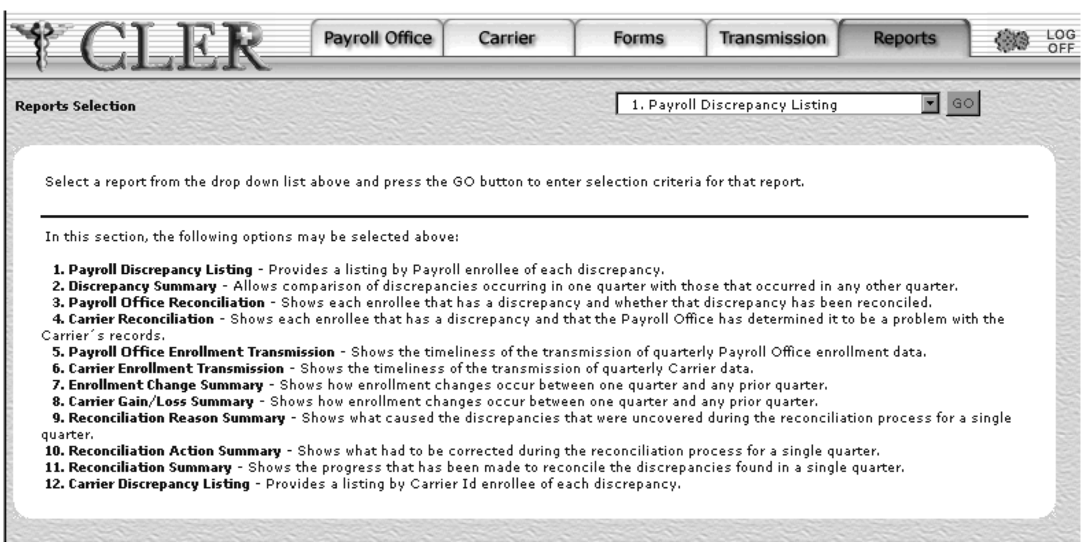


Figure 2:89. Reports Selection Page

To view a Payroll Discrepancy Listing report:

1. Click **[Reports]** at the top of the CLER Main Menu (**Figure 1:2**). The Reports Selection page (**Figure 2:89**) is displayed.

2. Click the drop-down menu on the Reports Selection page and select **[Payroll Discrepancy Listing]**.

3. Click **[GO]** to display the Payroll Discrepancy Listing (Report 1) page (**Figure 2:90**).

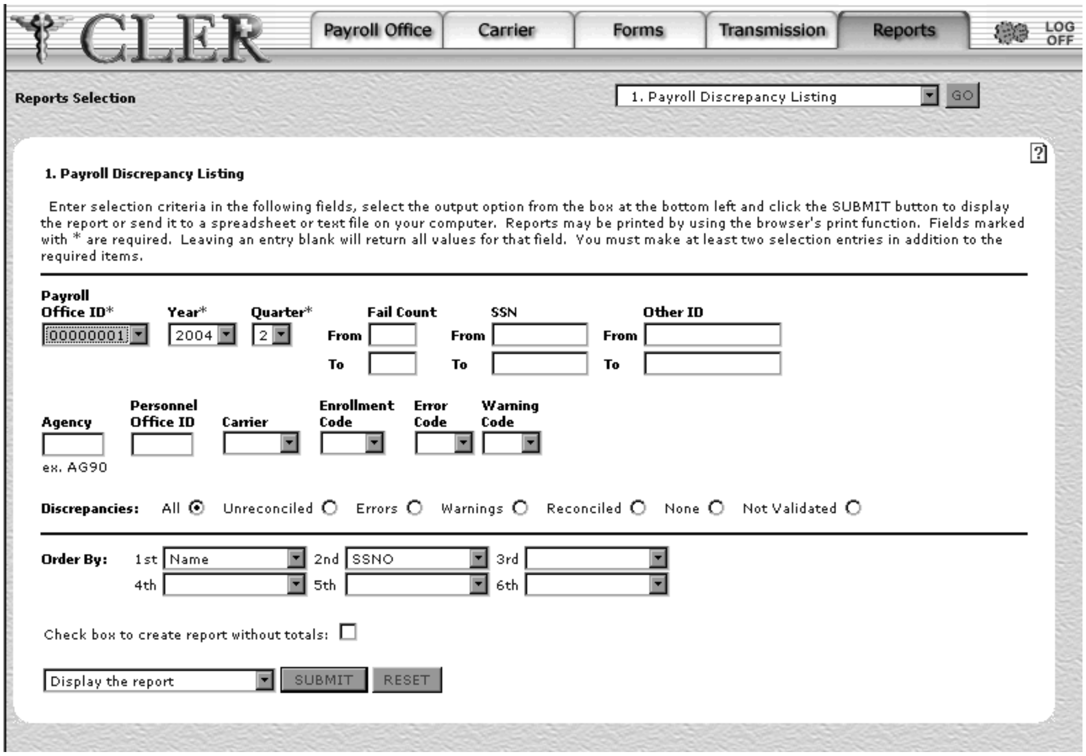


Figure 2:90. Payroll Discrepancy Listing (Report 1) Page

4. Complete the fields on the Payroll Discrepancy Listing (Report 1) page as indicated under **Payroll Discrepancy Listing (Report 1) Page Field Instructions** in **Part 3**.

5. Click the drop-down menu at the bottom of the page and select one of the following format options:

- Display the report
- Save report as a spreadsheet
- Save report as a text file

6. Click **[Submit]** to display the Payroll Discrepancy Listing report (**Figure 2:91**) in the selected format. If **`24900002`**, **`24900003`**, or **`160099XX`** was entered in the Payroll Office ID field on the Payroll Discrepancy Listing (Report 1) page, the Payroll Discrepancy Listing (Other ID) report (**Figure 2:92**) is displayed. For field descriptions, see **Payroll Discrepancy Listing (Report 1) Field Descriptions** in **Part 3**.

Note: To return to the Payroll Discrepancy Listing (Report 1) page, close the report.

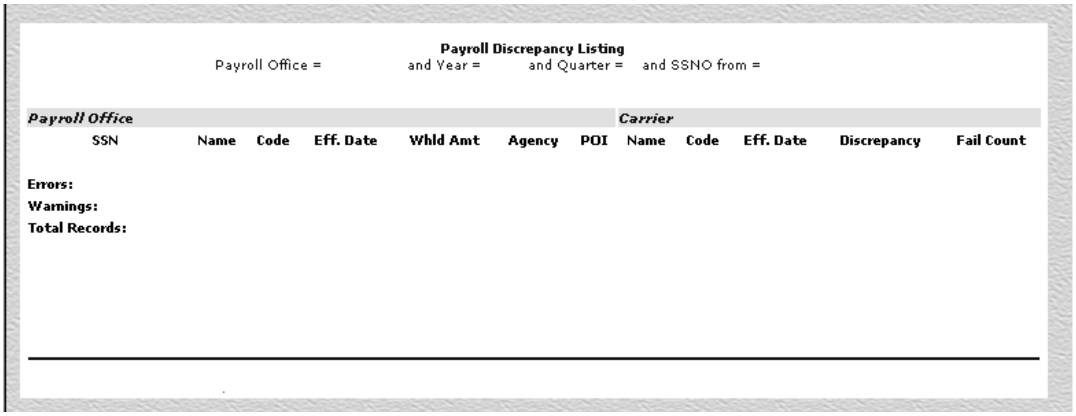


Figure 2:91. Payroll Discrepancy Listing Report

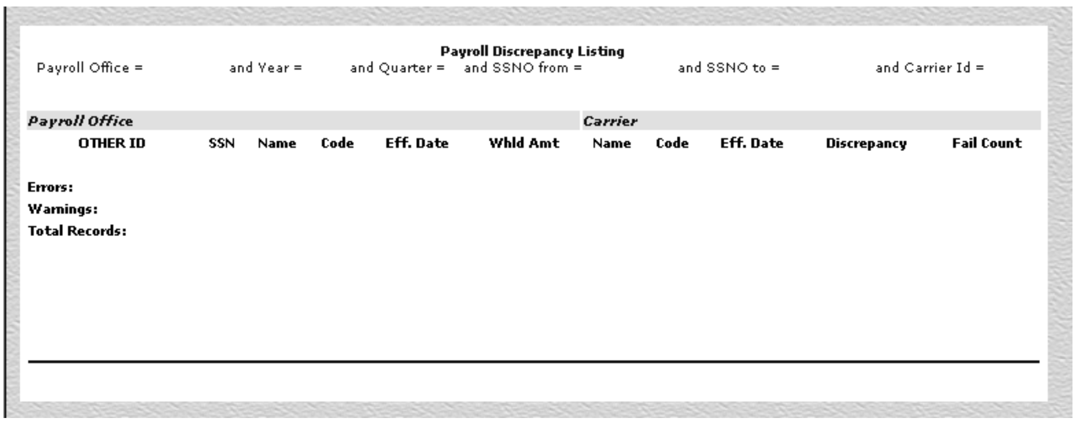


Figure 2:92. Payroll Discrepancy Listing (Other ID) Report

Viewing Discrepancy Summary (Report 2)

The Discrepancy Summary (Report 2) option on the Reports Selection page (**Figure 2:89**) allows users to view the Discrepancy Summary report. This report provides a comparison of the number of enrollee records with discrepancies occurring in one quarter with those that occurred in any other quarter.

To view a Discrepancy Summary report:

1. Click **[Reports]** at the top of the CLER Main Menu (**Figure 1:2**). The Reports Selection page (**Figure 2:89**) is displayed.

2. Click the drop-down menu on the Reports Selection page and select **[Discrepancy Summary]**.

3. Click **[GO]** to display the Discrepancy Summary (Report 2) page (**Figure 2:93**).

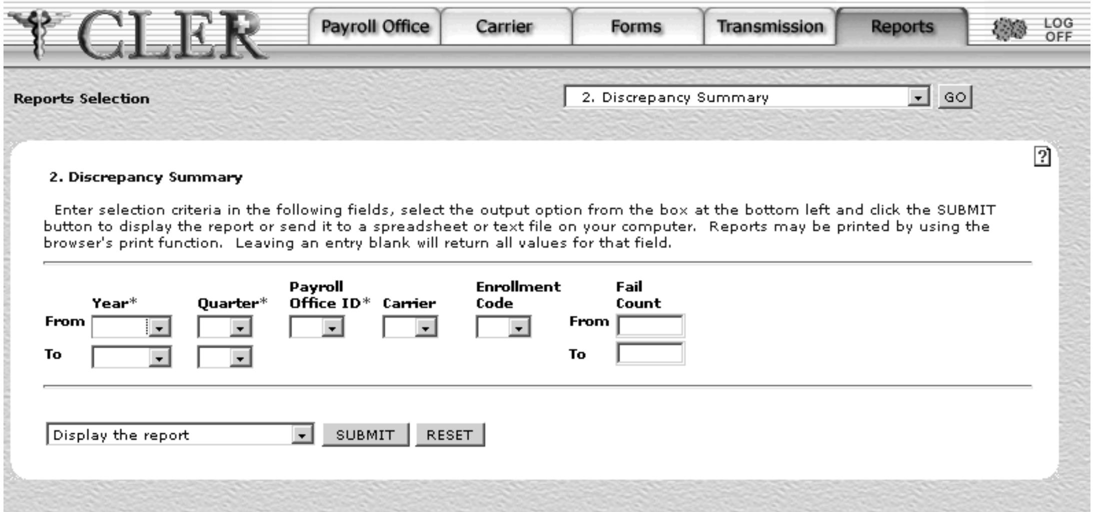


Figure 2:93. Discrepancy Summary (Report 2) Page

4. Complete the fields on the Discrepancy Summary (Report 2) page as indicated under **Discrepancy Summary (Report 2) Page Field Instructions** in **Part 3**.

5. Click the drop-down menu at the bottom of the page and select one of the following format options:
   - Display the report
   - Save report as a spreadsheet
   - Save report as a text file

6. Click **[Submit]** to display the Discrepancy Summary report (**Figure 2:94**) in the selected format. For field descriptions, see **Discrepancy Summary (Report 2) Field Descriptions** in **Part 3**.

   Note: To return to the Discrepancy Summary (Report 2) page, close the report.

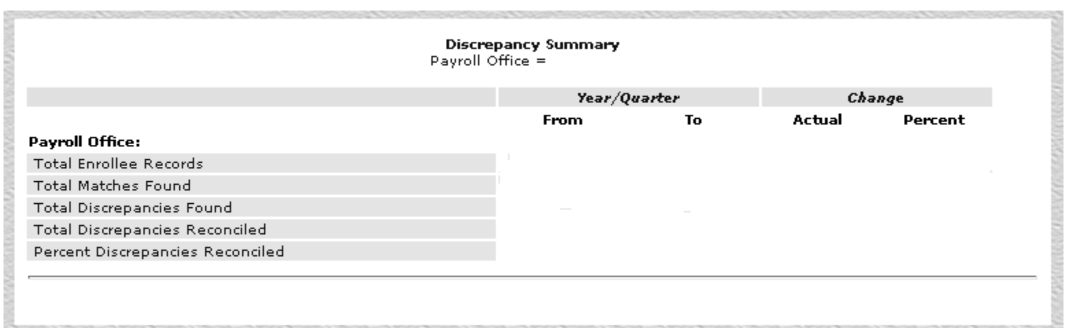


Figure 2:94. Discrepancy Summary Report

Viewing Payroll Office Reconciliation (Report 3)

The Payroll Office Reconciliation (Report 3) option on the Reports Selection page (**Figure 2:89**) allows users to view the Payroll Office Reconciliation report. This report lists each enrollee record that has a discrepancy and indicates whether that discrepancy has been reconciled.

To view a Payroll Office Reconciliation report:

1. Click **[Reports]** at the top of the CLER Main Menu (**Figure 1:2**). The Reports Selection page (**Figure 2:89**) is displayed.
2. Click the drop-down menu on the Reports Selection page and select **[Payroll Office Reconciliation]**.
3. Click **[GO]** to display the Payroll Office Reconciliation (Report 3) page (**Figure 2:95**).

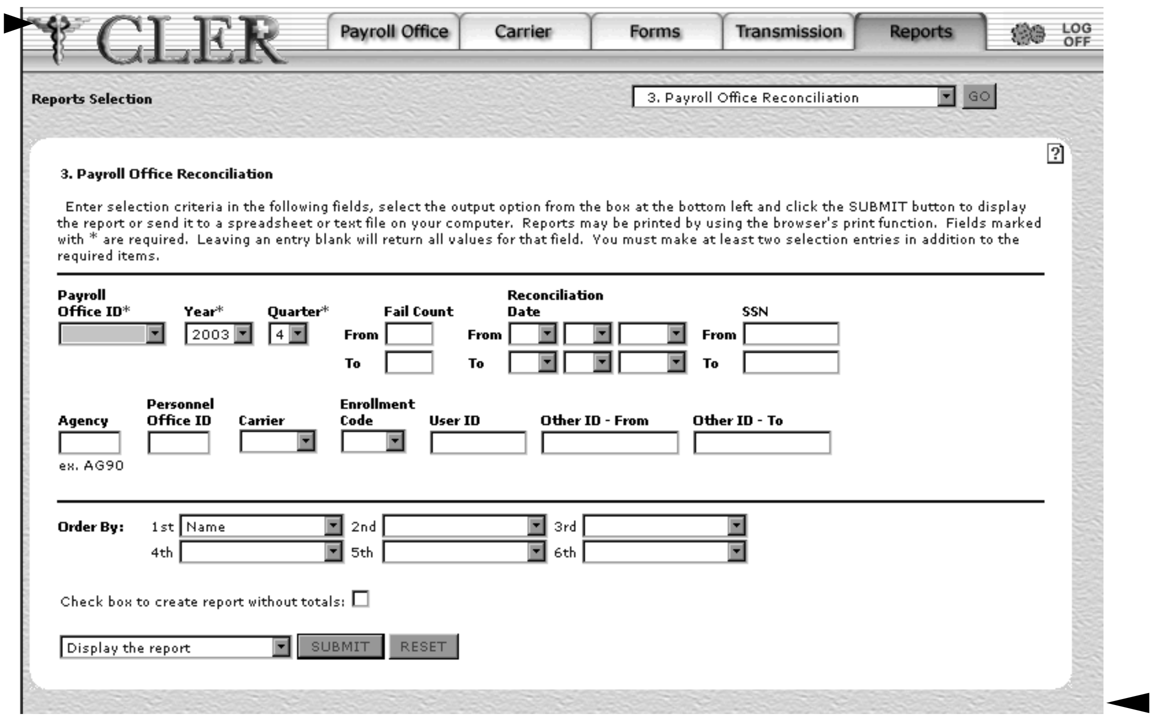


Figure 2:95. Payroll Office Reconciliation (Report 3) Page

4. Complete the fields on the Payroll Office Reconciliation (Report 3) page as indicated under **Payroll Office Reconciliation (Report 3) Page Field Instructions** in **Part 3**.
5. Click the drop-down menu at the bottom of the page and select one of the following format options:
   - Display the report
   - Save report as a spreadsheet
   - Save report as a text file
6. Click **[Submit]** to display the Payroll Office Reconciliation report (**Figure 2:96**) in the selected format. If **24900002**, **24900003**, or **160099XX** was entered in the

Payroll Office ID field on the Payroll Office Reconciliation (Report 3) page, the Payroll Office Reconciliation (Other ID) report (**Figure 2:97**) is displayed. For field descriptions, see **Payroll Office Reconciliation (Report 3) Field Descriptions** in **Part 3**.

Note: To return to the Payroll Office Reconciliation (Report 3) page, close the report.

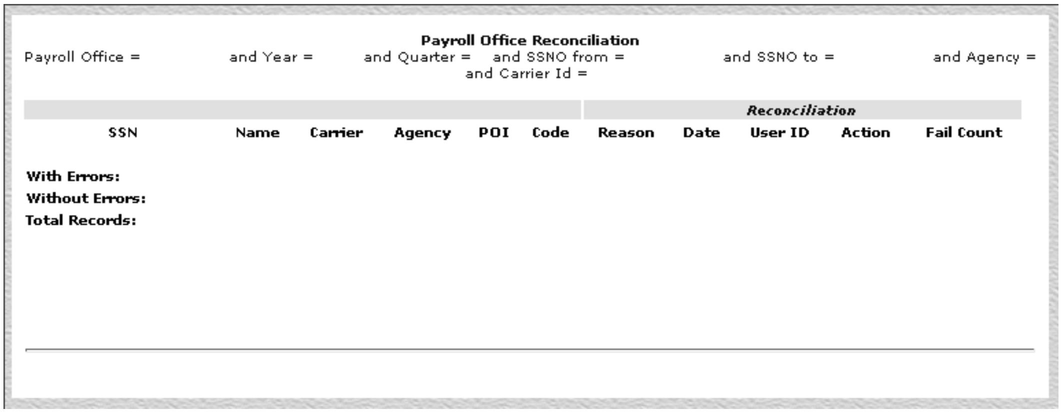


Figure 2:96. Payroll Office Reconciliation Report

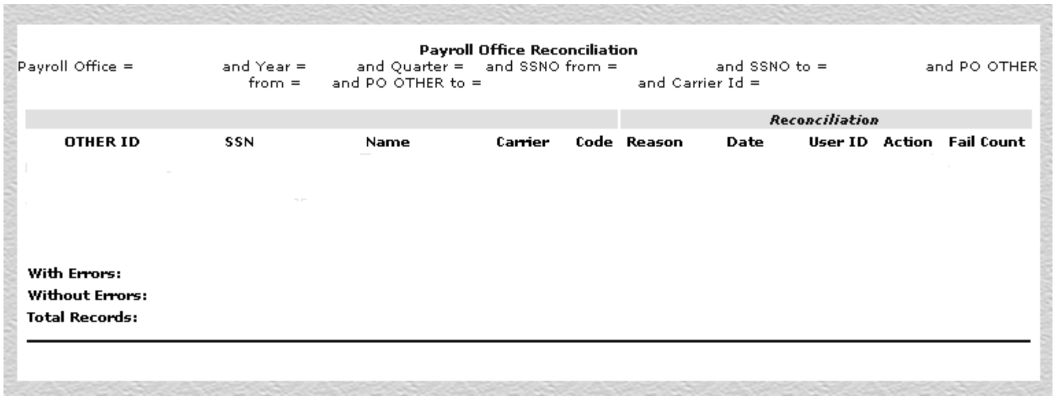


Figure 2:97. Payroll Office Reconciliation (Other ID) Report

Viewing Carrier Reconciliation (Report 4)

The Carrier Reconciliation (Report 4) option on the Reports Selection page (**Figure 2:89**) allows users to view the Carrier Reconciliation report. This report lists each enrollee record that has a discrepancy that the payroll office has determined to be a problem with the carrier's records.

To view a Carrier Reconciliation report:

1. Click **[Reports]** at the top of the CLER Main Menu (**Figure 1:2**). The Reports Selection page (**Figure 2:89**) is displayed.
2. Click the drop-down menu on the Reports Selection page and select **[Carrier Reconciliation]**.
3. Click **[GO]** to display the Carrier Reconciliation (Report 4) page (**Figure 2:98**).

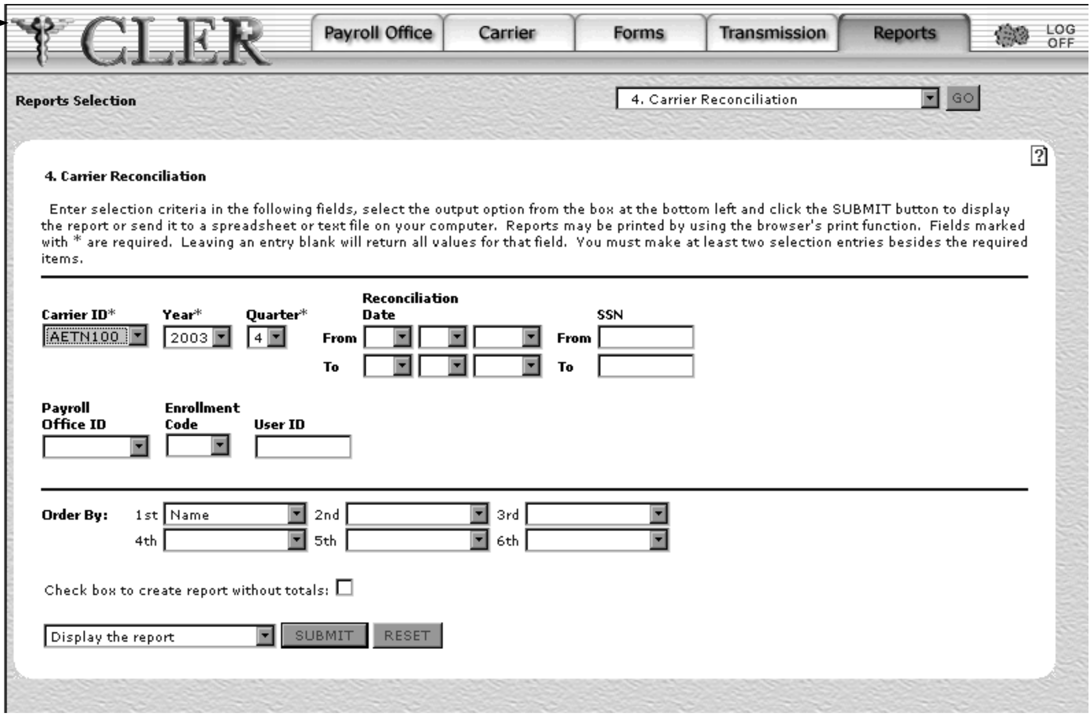


Figure 2:98. Carrier Reconciliation (Report 4) Page

4. Complete the fields on the Carrier Reconciliation (Report 4) page as indicated under **Carrier Reconciliation (Report 4) Page Field Instructions** in **Part 3**.

5. Click the drop-down menu at the bottom of the page and select one of the following format options:

   - Display the report
   - Save report as a spreadsheet
   - Save report as a text file

6. Click **[Submit]** to display the Carrier Reconciliation report (**Figure 2:99**) in the selected format. For field descriptions, see **Carrier Reconciliation (Report 4) Field Descriptions** in **Part 3**.

   Note: To return to the Carrier Reconciliation (Report 4) page, close the report.

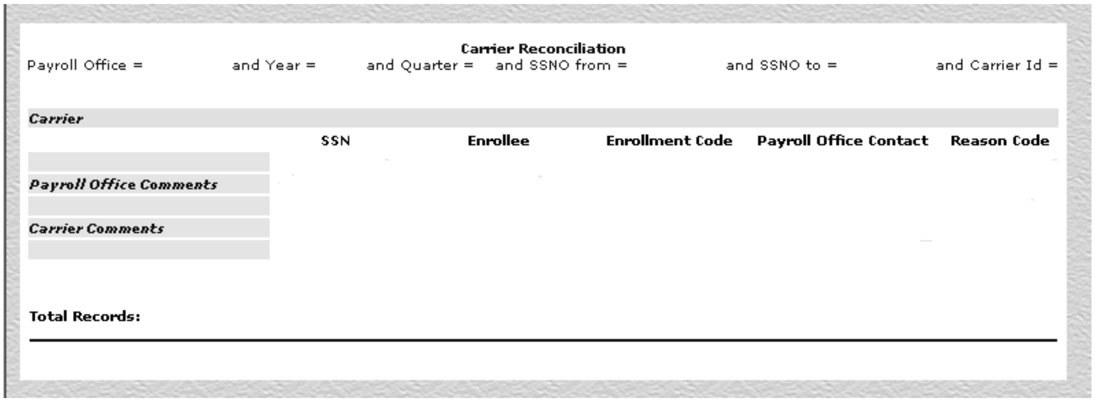


Figure 2:99. Carrier Reconciliation Report

Viewing Payroll Office Enrollment Transmission (Report 5)

The Payroll Office Enrollment Transmission (Report 5) option on the Reports Selection page (**Figure 2:89**) allows users to view the Payroll Office Enrollment Transmission report. This report provides information regarding the timeliness of the transmission of quarterly payroll office enrollment data.

To view a Payroll Office Enrollment Transmission report:

1. Click **[Reports]** at the top of the CLER Main Menu (**Figure 1:2**). The Reports Selection page (**Figure 2:89**) is displayed.
2. Click the drop-down menu on the Reports Selection page and select **[Payroll Office Enrollment Transmission]**.
3. Click **[GO]** to display the Payroll Office Enrollment Transmission (Report 5) page (**Figure 2:100**).

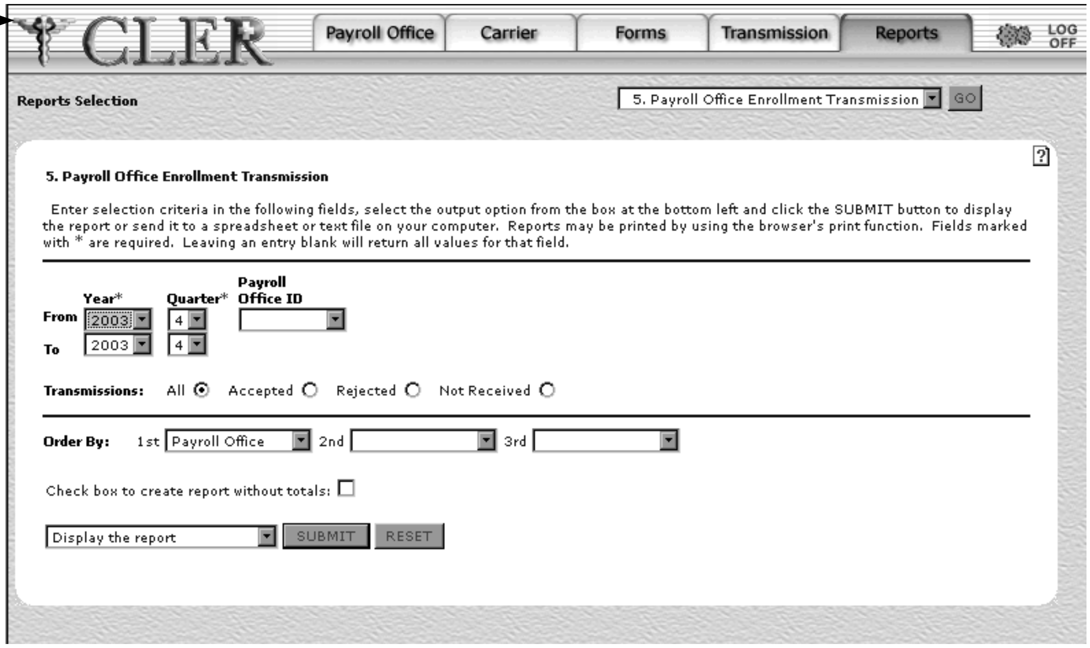


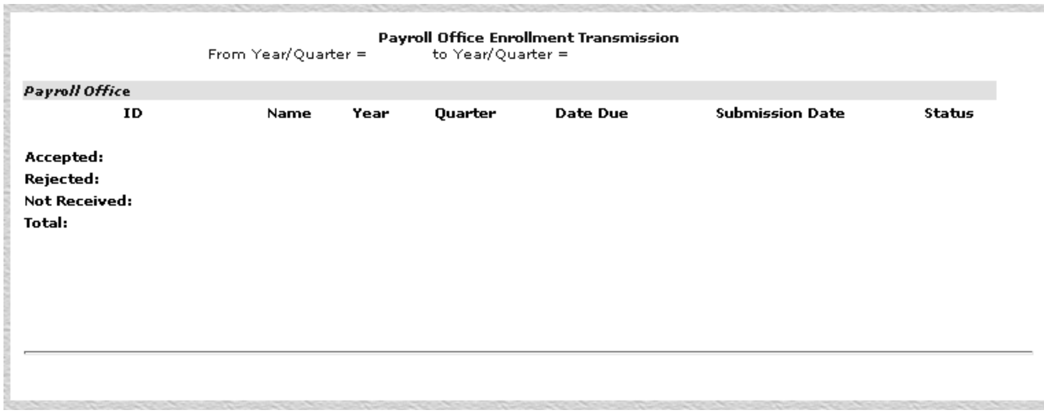
Figure 2:100. Payroll Office Enrollment Transmission (Report 5) Page

4. Complete the fields on the Payroll Office Enrollment Transmission (Report 5) page as indicated under **Payroll Office Enrollment Transmission (Report 5) Page Field Instructions** in **Part 3**.

5. Click the drop-down menu at the bottom of the page and select one of the following format options:
   - Display the report
   - Save report as a spreadsheet
   - Save report as a text file

6. Click **[Submit]** to display the Payroll Office Enrollment Transmission report (**Figure 2:101**) in the selected format. For field descriptions, see **Payroll Office Enrollment Transmission (Report 5) Field Descriptions** in **Part 3**.

   Note: To return to the Payroll Office Enrollment Transmission (Report 5) page, close the report.



Payroll Office Enrollment Transmission
From Year/Quarter = to Year/Quarter =

Payroll Office

ID	Name	Year	Quarter	Date Due	Submission Date	Status

Accepted:
Rejected:
Not Received:
Total:

Figure 2:101. Payroll Office Enrollment Transmission Report

Viewing Carrier Enrollment Transmission (Report 6)

The Carrier Enrollment Transmission (Report 6) option on the Reports Selection page (**Figure 2:89**) allows users to view the Carrier Enrollment Transmission report. This report provides information regarding the timeliness of the transmission of quarterly carrier enrollment data.

To view a Carrier Enrollment Transmission report:

1. Click **[Reports]** at the top of the CLER Main Menu (**Figure 1:2**). The Reports Selection page (**Figure 2:89**) is displayed.
2. Click the drop-down menu on the Reports Selection page and select **[Carrier Enrollment Transmission]**.
3. Click **[GO]** to display the Carrier Enrollment Transmission (Report 6) page (**Figure 2:102**).

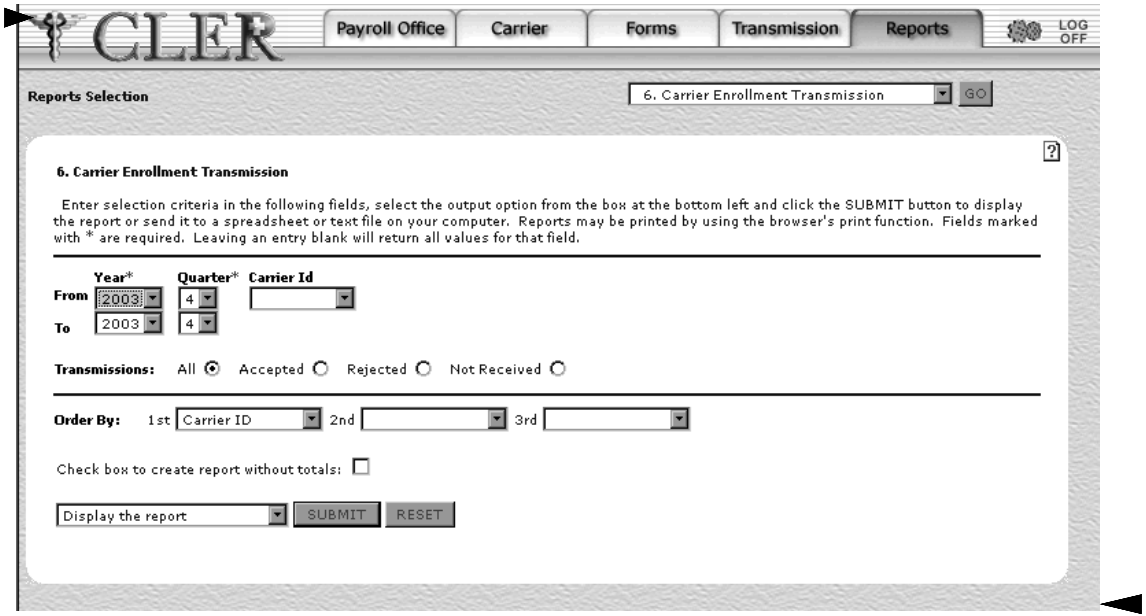


Figure 2:102. Carrier Enrollment Transmission (Report 6) Page

4. Complete the fields on the Carrier Enrollment Transmission (Report 6) page as indicated under **Carrier Enrollment Transmission (Report 6) Page Field Instructions** in **Part 3**.

5. Click the drop-down menu at the bottom of the page and select one of the following format options:

   - Display the report
   - Save report as a spreadsheet
   - Save report as a text file

6. Click **[Submit]** to display the Carrier Enrollment Transmission report (**Figure 2:103**) in the selected format. For field descriptions, see **Carrier Enrollment Transmission (Report 6) Field Descriptions** in **Part 3**.

   Note: To return to the Carrier Enrollment Transmission (Report 6) page, close the report.

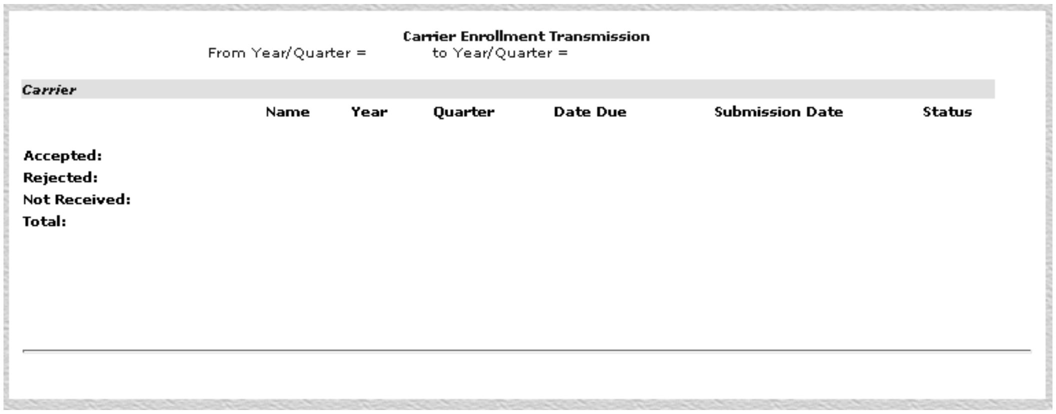


Figure 2:103. Carrier Enrollment Transmission Report

Viewing Enrollment Change Summary (Report 7)

The Enrollment Change Summary (Report 7) option on the Reports Selection page (**Figure 2:89**) allows users to view the Enrollment Change Summary report. This report lists additions and changes in enrollment between carriers and enrollment codes when comparing one quarter to any prior quarter.

To view an Enrollment Change Summary report:

1. Click **[Reports]** at the top of the CLER Main Menu (**Figure 1:2**). The Reports Selection page (**Figure 2:89**) is displayed.
2. Click the drop-down menu on the Reports Selection page and select **[Enrollment Change Summary]**.
3. Click **[GO]** to display the Enrollment Change Summary (Report 7) page (**Figure 2:104**).

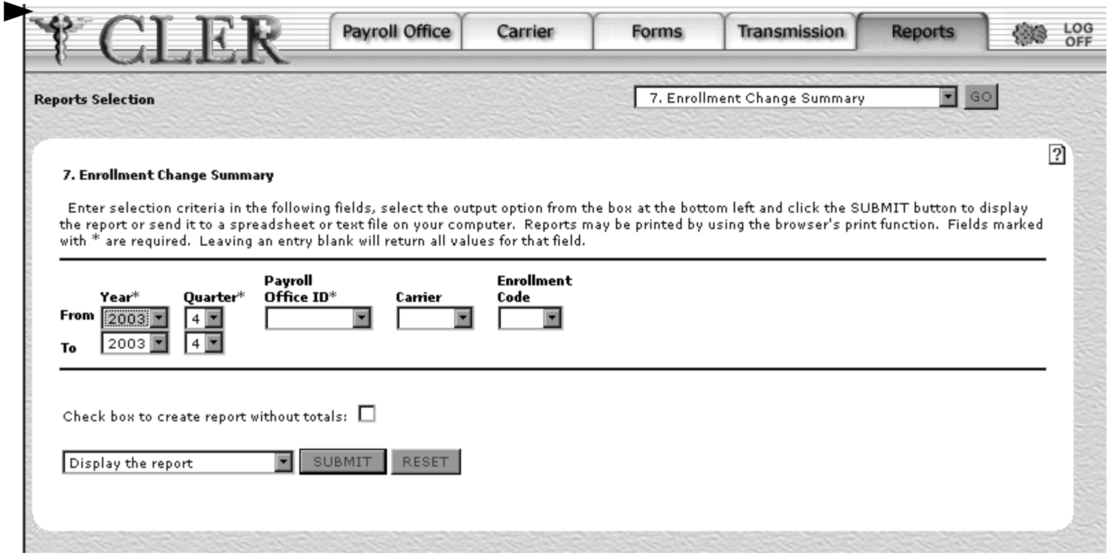


Figure 2:104. Enrollment Change Summary (Report 7) Page

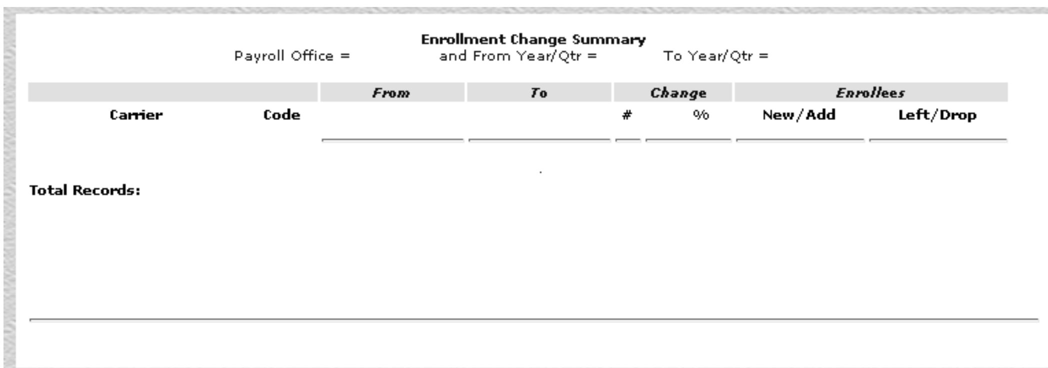
4. Complete the fields on the Enrollment Change Summary (Report 7) page as indicated under **Enrollment Change Summary (Report 7) Page Field Instructions** in **Part 3**.

5. Click the drop-down menu at the bottom of the page and select one of the following format options:

   - Display the report
   - Save report as a spreadsheet
   - Save report as a text file

6. Click **[Submit]** to display the Enrollment Change Summary report (**Figure 2:105**) in the selected format. For field descriptions, see **Enrollment Change Summary (Report 7) Field Descriptions** in **Part 3**.

   Note: To return to the Enrollment Change Summary (Report 7) page, close the report.



Enrollment Change Summary
Payroll Office = and From Year/Qtr = To Year/Qtr =

		From	To	Change		Enrollees	
Carrier	Code			#	%	New/Add	Left/Drop

Total Records:

Figure 2:105. Enrollment Change Summary Report

Viewing Carrier Gain/Loss Summary (Report 8)

The Carrier Gain/Loss Summary (Report 8) option on the Reports Selection page (**Figure 2:89**) allows users to view the Carrier Gain/Loss Summary report. This report provides information regarding the movement of enrollees between carriers and plans (enrollment codes) when comparing one quarter to any prior quarter.

To view a Carrier Gain/Loss Summary report:

1. Click **[Reports]** at the top of the CLER Main Menu (**Figure 1:2**). The Reports Selection page (**Figure 2:89**) is displayed.

2. Click the drop-down menu on the Reports Selection page and select **[Carrier Gain/Loss Summary]**.

3. Click **[GO]** to display the Carrier Gain/Loss Summary (Report 8) page (**Figure 2:106**).

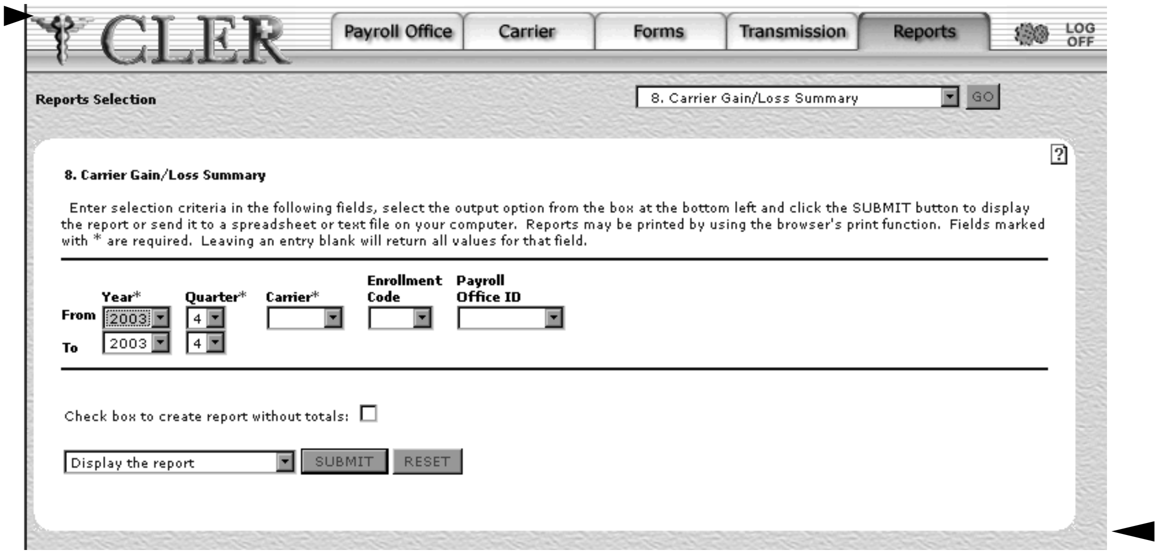


Figure 2:106. Carrier Gain/Loss Summary (Report 8) Page

4. Complete the fields on the Carrier Gain/Loss Summary (Report 8) page as indicated under **Carrier Gain/Loss Summary (Report 8) Page Field Instructions** in **Part 3**.

5. Click the drop-down menu at the bottom of the page and select one of the following format options:

   - Display the report
   - Save report as a spreadsheet
   - Save report as a text file

6. Click **[Submit]** to display the Carrier Gain/Loss Summary report (**Figure 2:107**) in the selected format. For field descriptions, see **Carrier Gain/Loss Summary (Report 8) Field Descriptions** in **Part 3**.

   Note: To return to the Carrier Gain/Loss Summary (Report 8) page, close the report.

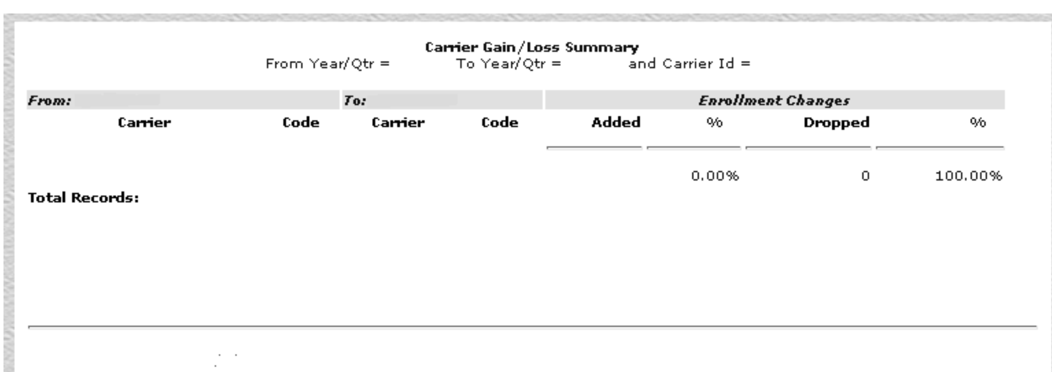


Figure 2:107. Carrier Gain/Loss Summary Report

Viewing Reconciliation Reason Summary (Report 9)

The Reconciliation Reason Summary (Report 9) option on the Reports Selection page (**Figure 2:89**) allows users to view the Reconciliation Reason Summary report. This report provides information regarding the cause of the discrepancies that were identified during the reconciliation process for a single quarter.

To view a Reconciliation Reason Summary report:

1. Click **[Reports]** at the top of the CLER Main Menu (**Figure 1:2**). The Reports Selection page (**Figure 2:89**) is displayed.
2. Click the drop-down menu on the Reports Selection page and select **[Reconciliation Reason Summary]**.
3. Click **[GO]** to display the Reconciliation Reason Summary (Report 9) page (**Figure 2:108**).

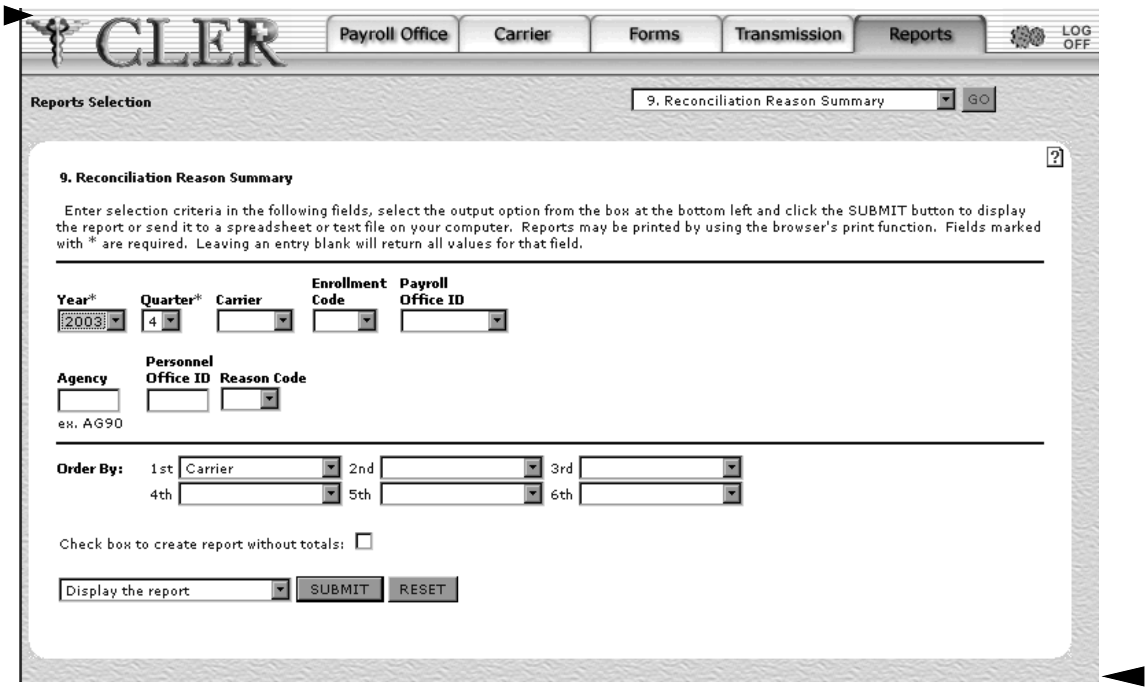


Figure 2:108. Reconciliation Reason Summary (Report 9) Page

4. Complete the fields on the Reconciliation Reason Summary (Report 9) page as indicated under **Reconciliation Reason Summary (Report 9) Page Field Instructions** in **Part 3**.
5. Click the drop-down menu at the bottom of the page and select one of the following format options:
   - Display the report
   - Save report as a spreadsheet
   - Save report as a text file

6. Click **[Submit]** to display the Reconciliation Reason Summary report (**Figure 2:109**) in the selected format. For field descriptions, see **Reconciliation Reason Summary (Report 9) Field Descriptions** in **Part 3**.

   Note: To return to the Reconciliation Reason Summary (Report 9) page, close the report.

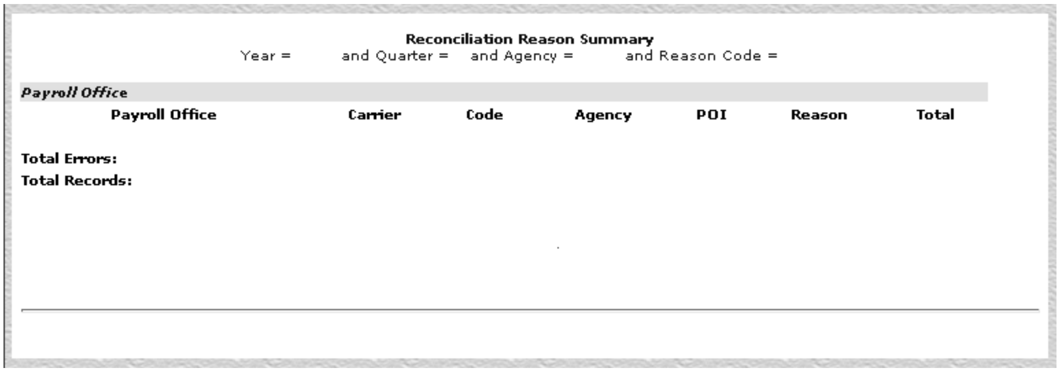


Figure 2:109. Reconciliation Reason Summary Report

Viewing Reconciliation Action Summary (Report 10)

The Reconciliation Action Summary (Report 10) option on the Reports Selection page (**Figure 2:89**) allows users to view the Reconciliation Action Summary report. This report provides information regarding the action to be taken to correct the discrepancies identified during the reconciliation process for a single quarter.

To view a Reconciliation Action Summary report:

1. Click **[Reports]** at the top of the CLER Main Menu (**Figure 1:2**). The Reports Selection page (**Figure 2:89**) is displayed.

2. Click the drop-down menu on the Reports Selection page and select **[Reconciliation Action Summary]**.

3. Click **[GO]** to display the Reconciliation Action Summary (Report 10) page (**Figure 2:110**).

CLER Processing Instructions

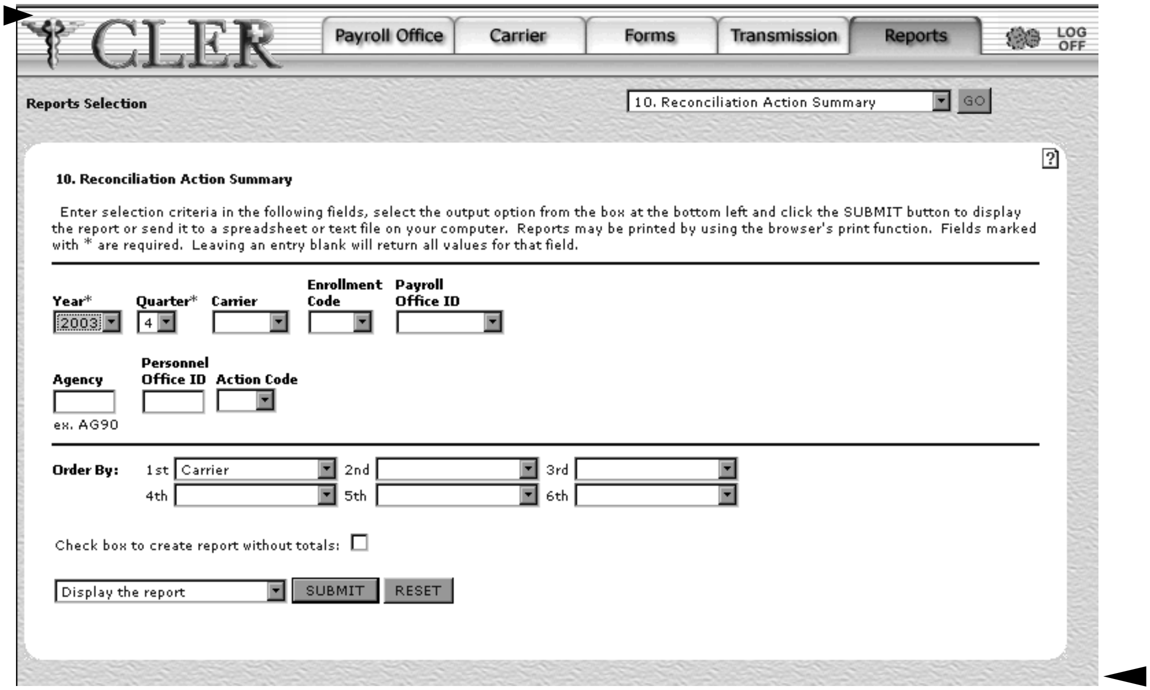


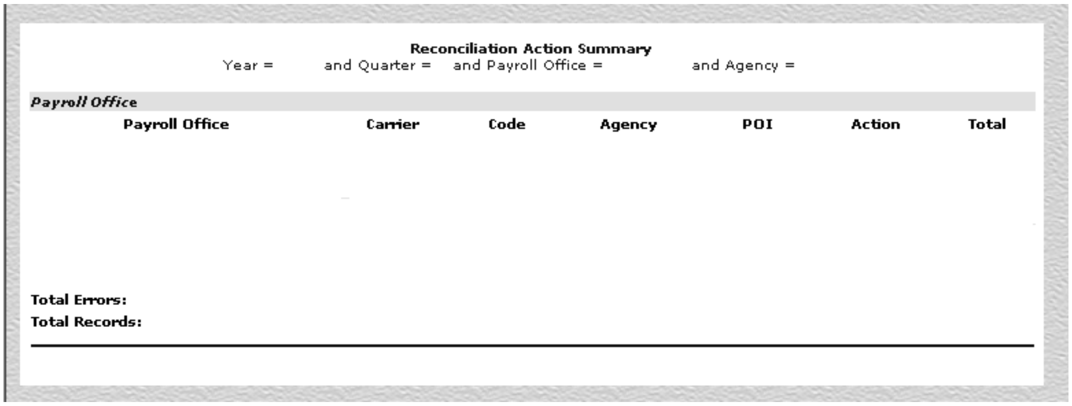
Figure 2:110. Reconciliation Action Summary (Report 10) Page

4. Complete the fields on the Reconciliation Action Summary (Report 10) page as indicated under **Reconciliation Action Summary (Report 10) Page Field Instructions** in **Part 3**.

5. Click the drop-down menu at the bottom of the page and select one of the following format options:
   - Display the report
   - Save report as a spreadsheet
   - Save report as a text file

6. Click **[Submit]** to display the Reconciliation Action Summary report (**Figure 2:111**) in the selected format. For field descriptions, see **Reconciliation Action Summary (Report 10) Field Descriptions** in **Part 3**.

   Note: To return to the Reconciliation Action Summary (Report 10) page, close the report.



Reconciliation Action Summary
Year = and Quarter = and Payroll Office = and Agency =

Payroll Office

Payroll Office	Carrier	Code	Agency	POI	Action	Total

Total Errors:
Total Records:

Figure 2:111. Reconciliation Action Summary Report

Viewing Reconciliation Summary (Report 11)

The Reconciliation Summary (Report 11) option on the Reports Selection page (**Figure 2:89**) allows users to view the Reconciliation Summary report. This report provides information regarding the progress that has been made to reconcile the discrepancies found in a single quarter.

To view a Reconciliation Summary report:

1. Click **[Reports]** at the top of the CLER Main Menu (**Figure 1:2**). The Reports Selection page (**Figure 2:89**) is displayed.
2. Click the drop-down menu on the Reports Selection page and select **[Reconciliation Summary]**.
3. Click **[GO]** to display the Reconciliation Summary (Report 11) page (**Figure 2:112**).

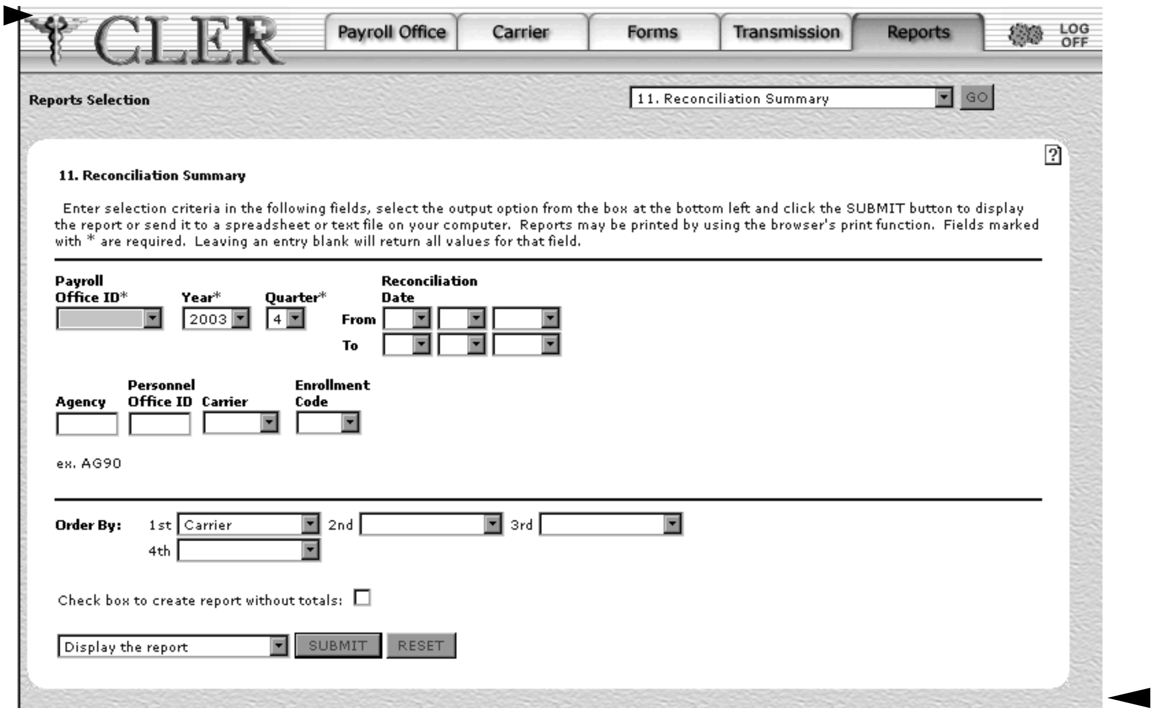


Figure 2:112. Reconciliation Summary (Report 11) Page

4. Complete the fields on the Reconciliation Summary (Report 11) page as indicated under **Reconciliation Summary (Report 11) Page Field Instructions** in **Part 3**.

5. Click the drop-down menu at the bottom of the page and select one of the following format options:

   - Display the report
   - Save report as a spreadsheet
   - Save report as a text file

6. Click **[Submit]** to display the Reconciliation Summary report (**Figure 2:113**) in the selected format. For field descriptions, see **Reconciliation Summary (Report 11) Field Descriptions** in **Part 3**.

   Note: To return to the Reconciliation Summary (Report 11) page, close the report.

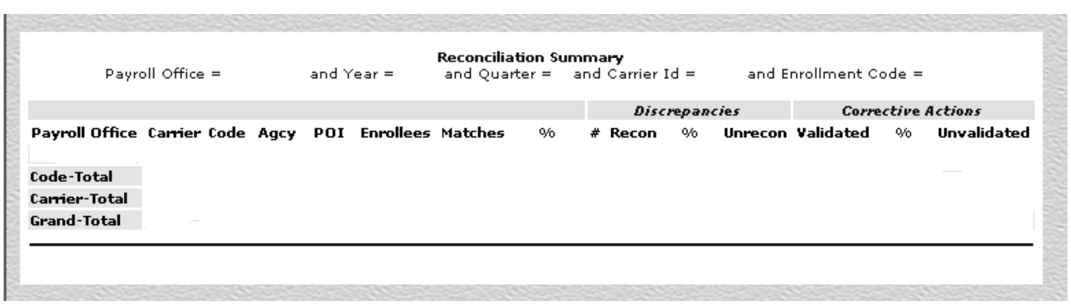


Figure 2:113. Reconciliation Summary Report

►Viewing Carrier Discrepancy Listing (Report 12)

The Carrier Discrepancy Listing (Report 12) option on the Reports Selection page (**Figure 2:89**) allows users to view the Carrier Discrepancy Listing report. This report provides a listing by carrier identification code of carrier and payroll office enrollee records that match, as well as records marked with carrier warning and discrepancy codes.

To view a Carrier Discrepancy Listing report:

1. Click **[Reports]** at the top of the CLER Main Menu (**Figure 1:2**). The Reports Selection page (**Figure 2:89**) is displayed.

2. Click the drop-down menu on the Reports Selection page and select **[Carrier Discrepancy Listing]**.

3. Click **[GO]** to display the Carrier Discrepancy Listing (Report 12) page (**Figure 2:114**).

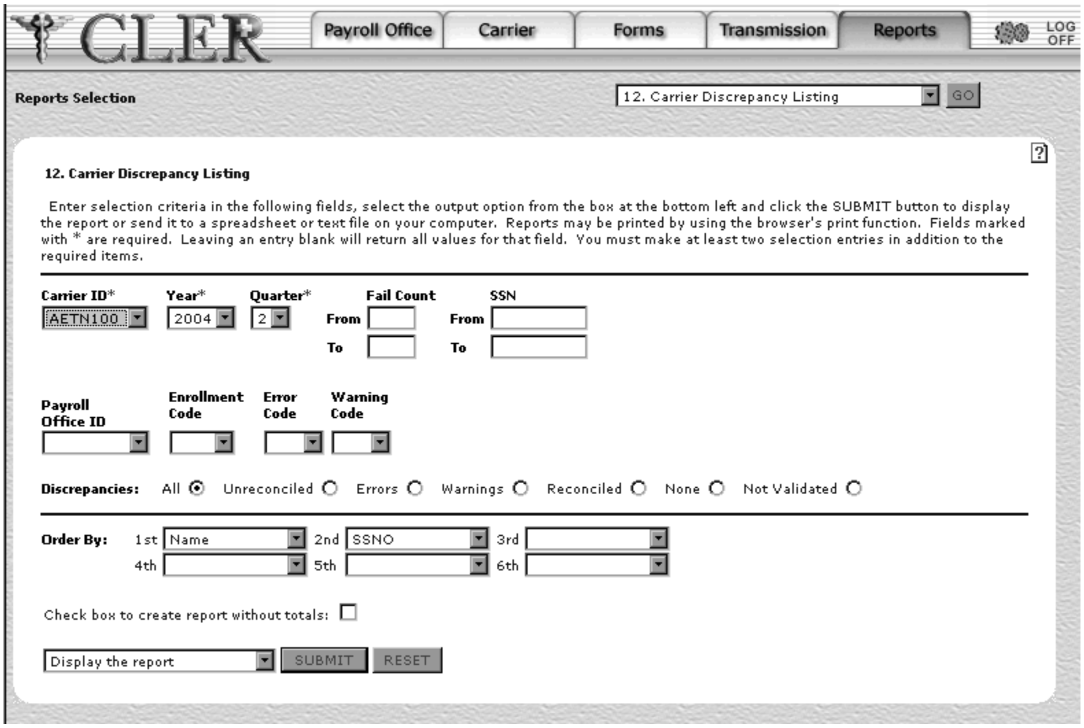


Figure 2:114. Carrier Discrepancy Listing (Report 12) Page

4. Complete the fields on the Carrier Discrepancy Listing (Report 12) page as indicated under [Carrier Discrepancy Listing (Report 12) Page Field Instructions]() in **Part 3**.

5. Click the drop-down menu at the bottom of the page and select one of the following format options:

   - Display the report
   - Save report as a spreadsheet
   - Save report as a text file

6. Click **[Submit]** to display the Carrier Discrepancy Listing report (**Figure 2:115**) in the selected format. For field descriptions, see **Carrier Discrepancy Listing (Report 12) Field Descriptions** in **Part 3**.

Note: To return to the Carrier Discrepancy Listing (Report 12) page, close the report.

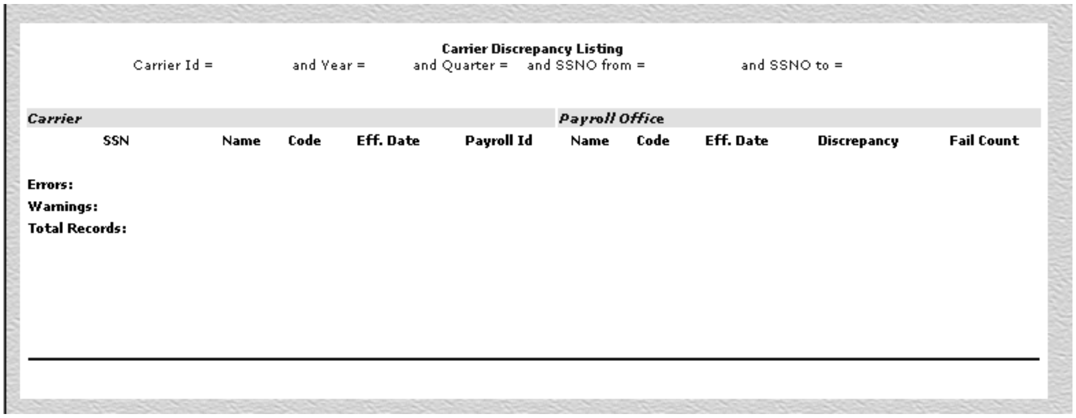


Figure 2:115. Carrier Discrepancy Listing Report

Viewing Maintenance Records

The Maintenance option ("gears" button) allows users to view schedule and system code records.

This section presents more information under the following topics:

[Viewing Schedule Records](#)
[Viewing System Code Records](#)

Viewing Schedule Records

The Schedules option on the Maintenance Main Page (**Figure 2:116**) allows users to view information about CLER processing dates.

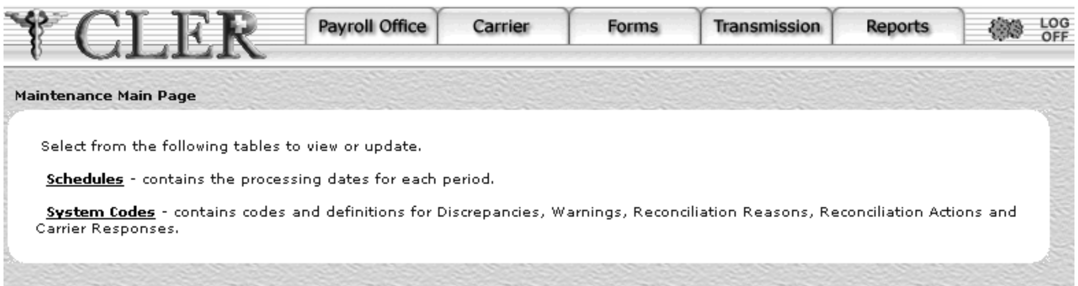


Figure 2:116. Maintenance Main Page

To view a schedule record:

1. Click the "gears" button at the top of the CLER Main Menu (**Figure 1:2**). The Maintenance Main Page (**Figure 2:116**) is displayed.
2. Click **[Schedules]** on the Maintenance Main Page to display the Schedules page (**Figure 2:117**).

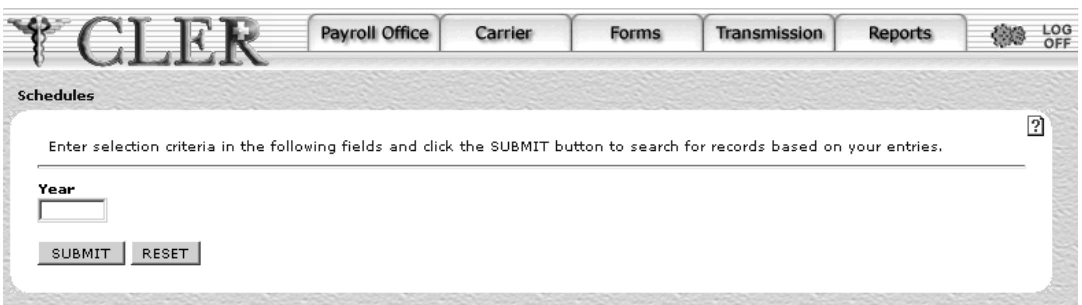


Figure 2:117. Schedules Page

3. Complete the field on the Schedules page as indicated under **[Schedules Page Field Instructions](#)** in **Part 3** and click **[Submit]**. The Schedules Search Results page (**Figure 2:118**) is displayed. For field descriptions, see **[Schedules Search Results Page Field Descriptions](#)** in **Part 3**.

Figure 2:118. Schedules Search Results Page

4. Click **[View]** next to the applicable record. The Schedules View page (**Figure 2:119**) is displayed. For field descriptions, see **Schedules View Page Field Descriptions** in **Part 3**.

   Note: To view another record, click your browser's Back button to return to the Schedules Search Results page and click **[View]** next to the applicable record.

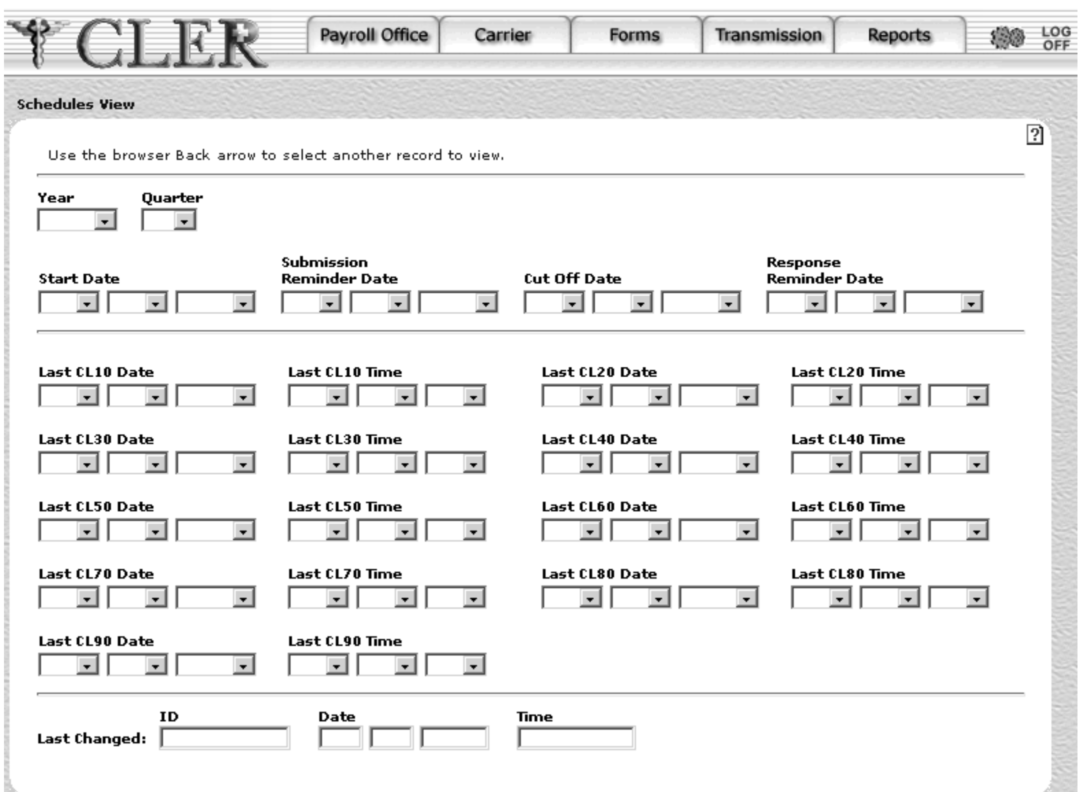


Figure 2:119. Schedules View Page

Viewing System Code Records

The System Codes option on the Maintenance Main Page (**Figure 2:116**) allows users to view information about system codes, discrepancy codes, warning codes, reconciliation reason codes, reconciliation action codes, and corrective action response codes.

To view a system code record:

1. Click the “gears” button at the top of the CLER Main Menu (**Figure 1:2**). The Maintenance Main Page (**Figure 2:116**) is displayed.

2. Click **[System Codes]** on the Maintenance Main Page to display the System Codes page (**Figure 2:120**).

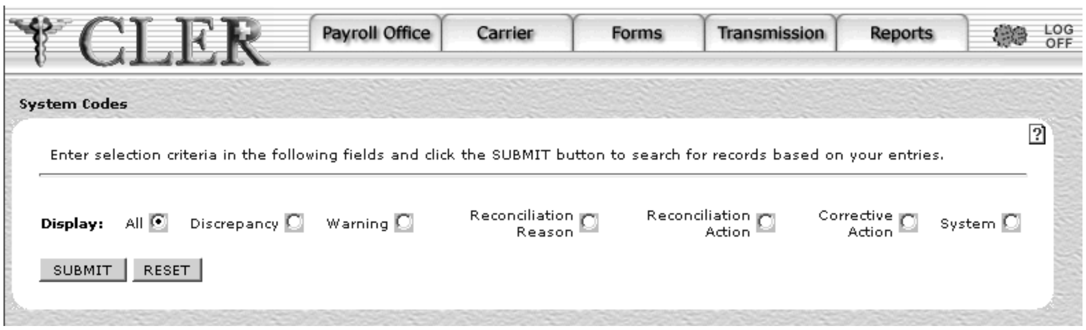


Figure 2:120. System Codes Page

3. Complete the fields on the System Codes page as indicated under [System Codes Page Field Instructions]() in **Part 3** and click **[Submit]**. The System Codes Search Results page (**Figure 2:121**) is displayed. For field descriptions, see [System Codes Search Results Page Field Descriptions]() in **Part 3**.

Figure 2:121. System Codes Search Results Page

4. Click **[View]** next to the applicable record. The System Codes View page (**Figure 2:122**) is displayed. For field descriptions, see [System Codes View Page Field Descriptions]() in **Part 3**.

   Note: To view another record, click your browser’s Back button to return to the System Codes Search Results page and click **[View]** next to the applicable record.

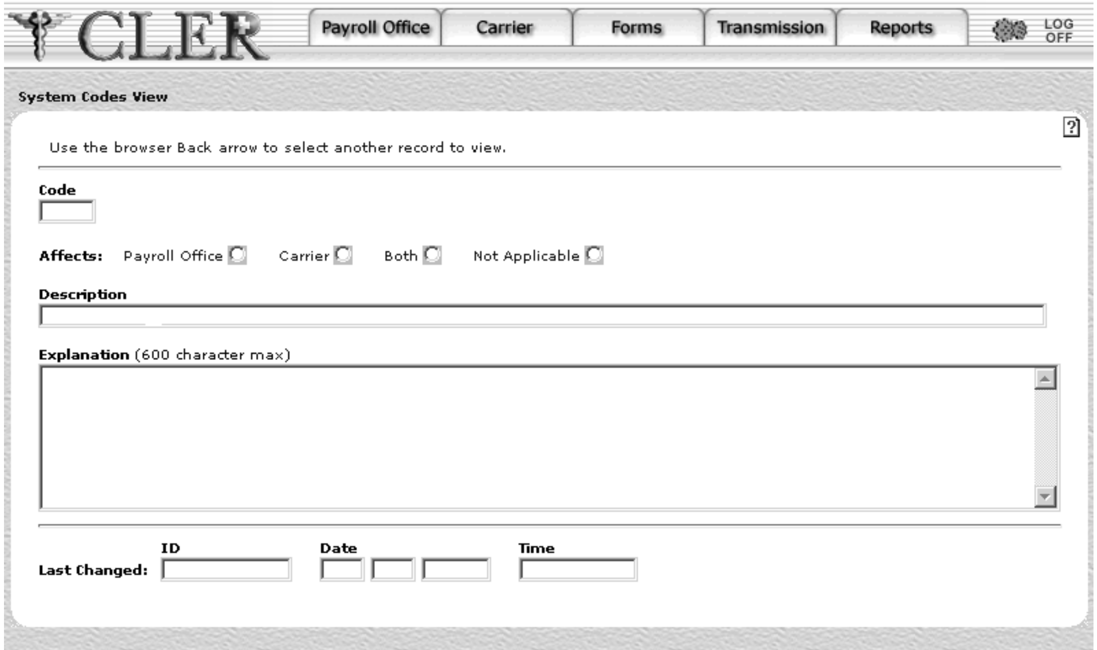


Figure 2:122. System Codes View Page

PART 3.

CLER Field Descriptions And Instructions

This part contains the following sections:

CLER Logon Field Instructions

The CLER Logon page (**Figure 1:1**) is used to access CLER. For instructions on using the CLER Logon page, see **Starting CLER** in **Part 1**.

User ID

Required, alphanumeric, 8 positions max.

Type the NFC-assigned user identification number. NFC's Information System Security Office (ISSO) assigns the user IDs for access to CLER.

Password

Required, alphanumeric, 6 - 8 positions

Type the password. NFC's ISSO initially assigns a temporary password that is later changed by the user.

Change Password

Optional

To change the user's password, click the checkbox. The Change Your Password pop-up window is displayed, prompting the user to enter and confirm the new password. Type the password in the Enter New Password and Confirm New Password fields and click **[Submit]**.

Note: The password must begin with an alpha character.

Payroll Office Field Descriptions And Instructions

This section presents the following topics:

Payroll Office Information Page Field Instructions

The Payroll Office Information page (**Figure 2:2**) is used to search for payroll office information records by payroll office ID, name, etc. For instructions on using the Payroll Office Information page, see **Viewing Payroll Office Information Records** in **Part 2**.

Payroll Office ID

Optional, alphanumeric, 8 positions

Type the payroll office identification number.

Name

Optional, alphanumeric, 40 positions max.

Type the name of the payroll office.

City

Optional, alphanumeric, 25 positions max.

Type the name of the payroll office's city.

Note: If the address is an overseas military address, type FPO for fleet post office or APO for army post office in lieu of the city.

State

Optional

Click the drop-down menu and select the payroll office's state, U.S. territory, or overseas military abbreviation. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory, And Overseas Military Abbreviations Table** in **Part 4**.

Order By

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the ID sort option. To choose a sort option, select the radio button next to one of the following values:

`ID`	Sorts search results by payroll office identification number.
`Name`	Sorts search results by payroll office name.
`City`	Sorts search results by payroll office city.

Payroll Office Information Search Results Page Field Descriptions

The Payroll Office Information Search Results page (**Figure 2:3**) displays a list of payroll office information records resulting from the search criteria entered on the Payroll Office Information page (**Figure 2:2**). For instructions on using the Payroll Office Information Search Results page, see **Viewing Payroll Office Information Records** in **Part 2**.

ID

No entry

This field is system generated. This is the payroll office identification number.

Name

No entry

This field is system generated. This is the name of the payroll office.

Address

No entry

This field is system generated. This is the payroll office's street or PO box address.

Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.

City

No entry

This field is system generated. This is the name of the payroll office's city.

State

No entry

This field is system generated. This is the payroll office's state, U.S. territory, or overseas military abbreviation. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory, And Overseas Military Abbreviations Table** in **Part 4**.

ZIP

No entry

This field is system generated. This is the payroll office's ZIP Code.

Payroll Office Information View Page Field Descriptions

The Payroll Office Information View page (**Figure 2:4**) displays a selected payroll office information record. For instructions on using the Payroll Office Information View page, see **Viewing Payroll Office Information Records** in **Part 2**.

Payroll Office ID

No entry

This field is system generated. This is the payroll office identification number.

Name

No entry

This field is system generated. This is the name of the payroll office.

Address Line 1

No entry

This field is system generated. This is the first line of the payroll office's street or PO box address.

Address Line 2

No entry

This field is system generated. This is the second line of the payroll office's street or PO box address.

Address Line 3

No entry

This field is system generated. This is the third line of the payroll office's street or PO box address.

City

No entry

This field is system generated. This is the name of the payroll office's city.

Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.

State

No entry

This field is system generated. This is the payroll office's state, U.S. territory, or overseas military abbreviation. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory, And Overseas Military Abbreviations Table** in **Part 4**.

ZIP

No entry

This field is system generated. This is the payroll office's ZIP Code.

Country

No entry

This field is system generated. This is the payroll office's country code. For a list and descriptions of country codes, see **Country Codes Table** in **Part 4**.

Start Date

No entry

This field is system generated. This is the first date the payroll office will be valid.

End Date

No entry

This field is system generated. This is the last date the payroll office will be valid.

Error Threshold

No entry

This field is system generated. This is the number or percentage of errors permitted for the payroll office before a transmission file is rejected.

Threshold Type

No entry

This field is system generated. This is a measure of the error threshold. The code **P** represents percent and code **N** represents number.

Transmission File Name

No entry

This field is system generated. This is the name of the quarterly transmission file sent by the payroll office.

Last Changed

ID

No entry

This field is system generated. This is the user identification number of the individual who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change.

Time

No entry

This field is system generated. This is the time of the most recent change.

Payroll Office Contacts Page Field Instructions

The Payroll Office Contacts page (**Figure 2:6**) is used to search for payroll office contact records by payroll office ID, type code, etc. For instructions on using the Payroll Office Contacts page, see **Maintaining Payroll And Personnel Office Contact Records** in **Part 2**.

Payroll Office ID

Optional, alphanumeric, 8 positions

Type the payroll office identification number.

Type

Optional

The Type code indicates whether the payroll office contact is an administrative contact or a technical contact. To select the Type code, click the drop-down menu and select either **`General`** for an administrative contact or **`Technical`** for a technical contact.

Display

Optional default

This field allows users to display search results by the options listed below. If no display option is selected, this field automatically defaults to the All display option. To choose a display option, select the radio button next to one of the following values:

`All`	Displays all contacts for the payroll office ID and type code entered.
`Active`	Displays active contacts for the payroll office ID and type code entered.
`Inactive`	Displays inactive contacts for the payroll office ID and type code entered.

Order By

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the ID sort option. To choose a sort option, select the radio button next to one of the following values:

`ID`	Sorts search results by payroll office ID.
`Type`	Sorts search results by type code.

Personnel Office Contacts Page Field Instructions

The Personnel Office Contacts page (**Figure 2:8**) is used to search for personnel office contact records by payroll office ID, personnel office ID, etc. For instructions on using the Personnel Office Contacts page, see **Maintaining Payroll And Personnel Office Contact Records** in **Part 2**.

Payroll Office ID

Optional, alphanumeric, 8 positions

Type the payroll office identification number.

Personnel Office ID

Optional, alphanumeric, 4 positions

Type the personnel office identification number.

Type

Optional

The Type code indicates whether the personnel office contact is an administrative contact or a technical contact. To select the Type code, click the drop-down menu and select either **`General`** for an administrative contact or **`Technical`** for a technical contact.

Display

Optional default

This field allows users to display search results by the options listed below. If no display option is selected, this field automatically defaults to the All display option. To choose a display option, select the radio button next to one of the following values:

`All`	Displays all contacts for the payroll office ID, personnel office ID, and type code entered.
`Active`	Displays active contacts for the payroll office ID, personnel office ID, and type code entered.
`Inactive`	Displays inactive contacts for the payroll office ID, personnel office ID, and type code entered.

Order By

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the ID sort option. To choose a sort option, select the radio button next to one of the following values:

`ID`	Sorts search results by payroll office ID.
`POI`	Sorts search results by personnel office ID.
`Type`	Sorts search results by type code.

Payroll Office Contacts Add Page Field Instructions

The Payroll Office Contacts Add page (**Figure 2:7**) is used to add a payroll office contact record. For instructions on using the Payroll Office Contacts Add page, see **Adding A Payroll Office Contact Record** in **Part 2**.

Payroll Office ID

Required

Click the drop-down menu and select the payroll office identification number.

Type

Required

The Type code indicates whether the payroll office contact is an administrative contact or a technical contact. To select the Type code, click the drop-down menu and select either **`General`** for an administrative contact or **`Technical`** for a technical contact.

Role

Optional, alphanumeric, 40 positions max.

Type the title, position, etc., of the payroll office contact.

Name

Optional, alphanumeric, 30 positions max.

Type the name of the payroll office contact.

Address Line 1

Optional, alphanumeric, 40 positions max.

Type the first line of the payroll office contact's street or PO box address.

Address Line 2

Optional, alphanumeric, 40 positions max.

Type the second line of the payroll office contact's street or PO box address.

Address Line 3

Optional, alphanumeric, 40 positions max.

Type the third line of the payroll office contact's street or PO box address.

City

Optional, alphanumeric, 25 positions max.

Type the name of the payroll office contact's city.

Note: If the address is an overseas military address, type FPO for fleet post office or APO for army post office in lieu of the city.

State

Optional

Click the drop-down menu and select the payroll office contact's state, U.S. territory, or overseas military abbreviation. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory, And Overseas Military Abbreviations Table** in **Part 4**.

ZIP

Optional, alphanumeric, 11 positions max.

Type the payroll office contact's ZIP Code.

Country

Optional

Click the drop-down menu and select the payroll office contact's country code. For a list and descriptions of country codes, see **Country Codes Table** in **Part 4**.

Phone Number

Optional, alphanumeric, 25 positions max.

Type the payroll office contact's telephone number.

Fax Number

Optional, alphanumeric, 25 positions max.

Type the payroll office contact's fax number.

Email Address

Optional, alphanumeric, 60 positions max.

Type the payroll office contact's e-mail address.

Remarks

Optional, alphanumeric, 80 positions max.

Type remarks about this record.

Personnel Office Contacts Add Page Field Instructions

The Personnel Office Contacts Add page (**Figure 2:9**) is used to add a personnel office contact record. For instructions on using the Personnel Office Contacts Add page, see **Adding A Personnel Office Contact Record** in **Part 2**.

Payroll Office ID

Required

Click the drop-down menu and select the payroll office identification number.

Personnel Office ID

Required, alphanumeric, 4 positions

Type the personnel office identification number.

Type

Required

The Type code indicates whether the personnel office contact is an administrative contact or a technical contact. To select the Type code, click the drop-down menu and select either **`General`** for an administrative contact or **`Technical`** for a technical contact.

Role

Optional, alphanumeric, 40 positions max.

Type the title, position, etc., of the personnel office contact.

Name

Optional, alphanumeric, 30 positions max.

Type the name of the personnel office contact.

Address Line 1

Optional, alphanumeric, 40 positions max.

Type the first line of the personnel office contact's street or PO box address.

Address Line 2

Optional, alphanumeric, 40 positions max.

Type the second line of the personnel office contact's street or PO box address.

Address Line 3

Optional, alphanumeric, 40 positions max.

Type the third line of the personnel office contact's street or PO box address.

City

Optional, alphanumeric, 25 positions max.

Type the name of the personnel office contact's city.

Note: If the address is an overseas military address, type FPO for fleet post office or APO for army post office in lieu of the city.

State

Optional

Click the drop-down menu and select the personnel office contact's state, U.S. territory, or overseas military abbreviation. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory, And Overseas Military Abbreviations Table** in **Part 4**.

ZIP

Optional, alphanumeric, 11 positions max.

Type the personnel office contact's ZIP Code.

Country

Optional

Click the drop-down menu and select the personnel office contact's country code. For a list and descriptions of country codes, see **Country Codes Table** in **Part 4**.

Phone Number

Optional, alphanumeric, 25 positions max.

Type the personnel office contact's telephone number.

Fax Number

Optional, alphanumeric, 25 positions max.

Type the personnel office contact's fax number.

Email Address

Optional, alphanumeric, 60 positions max.

Type the personnel office contact's e-mail address.

Remarks

Optional, alphanumeric, 80 positions max.

Type remarks about this record.

CLER Field Descriptions And Instructions

Payroll Office Contacts Search Results Page Field Descriptions

The Payroll Office Contacts Search Results page (**Figure 2:10**) displays a list of payroll office contact records resulting from the search criteria entered on the Payroll Office Contacts page (**Figure 2:6**). For instructions on using the Payroll Office Contacts Search Results page, see **Maintaining Payroll And Personnel Office Contact Records** in **Part 2**.

ID

No entry

This field is system generated. This is the payroll office identification number.

Type

No entry

This field is system generated. The **`General`** type code indicates the payroll office contact holds an administrative position. The **`Technical`** type code indicates the payroll office contact holds a technical position.

Status

No entry

This field is system generated. Active indicates that the record has been activated in CLER. Inactive indicates that the record has been inactivated in CLER.

Name

No entry

This field is system generated. This is the name of the payroll office contact.

Phone

No entry

This field is system generated. This is the payroll office contact's telephone number.

Email

No entry

This field is system generated. This is the payroll office contact's e-mail address.

Personnel Office Contacts Search Results Page Field Descriptions

The Personnel Office Contacts Search Results page (**Figure 2:12**) displays a list of personnel office contact records resulting from the search criteria entered on the Personnel Office Contacts page (**Figure 2:8**). For instructions on using the Personnel Office Contacts Search Results page, see **Maintaining Payroll And Personnel Office Contact Records** in **Part 2**.

ID

No entry

This field is system generated. This is the payroll office identification number.

POI

No entry

This field is system generated. This is the personnel office identification number.

Type

No entry

This field is system generated. The `General` type code indicates the personnel office contact holds an administrative position. The `Technical` type code indicates the personnel office contact holds a technical position.

Status

No entry

This field is system generated. Active indicates that the record has been activated in CLER. Inactive indicates that the record has been inactivated in CLER.

Name

No entry

This field is system generated. This is the name of the personnel office contact.

Phone

No entry

This field is system generated. This is the personnel office contact's telephone number.

Email

No entry

This field is system generated. This is the personnel office contact's e-mail address.

Payroll Office Contacts View Page Field Descriptions

The Payroll Office Contacts View page (**Figure 2:11**) displays a selected payroll office contact record. For instructions on using the Payroll Office Contacts View page, see **Viewing A Payroll Office Contact Record** in **Part 2**.

Payroll Office ID

No entry

This field is system generated. This is the payroll office identification number.

Type

No entry

This field is system generated. The **`General`** type code indicates the payroll office contact holds an administrative position. The **`Technical`** type code indicates the payroll office contact holds a technical position.

Role

No entry

This field is system generated. This is the title, position, etc., of the payroll office contact.

Name

No entry

This field is system generated. This is the name of the payroll office contact.

Address Line 1

No entry

This field is system generated. This is the first line of the payroll office contact's street or PO box address.

Address Line 2

No entry

This field is system generated. This is the second line of the payroll office contact's street or PO box address.

Address Line 3

No entry

This field is system generated. This is the third line of the payroll office contact's street or PO box address.

City

No entry

This field is system generated. This is the name of the payroll office contact's city.

Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.

State

No entry

This field is system generated. This is the payroll office contact's state, U.S. territory, or overseas military abbreviation. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory, And Overseas Military Abbreviations Table** in **Part 4**.

ZIP

No entry

This field is system generated. This is the payroll office contact's ZIP Code.

Country

No entry

This field is system generated. This is the payroll office contact's country code. For a list and descriptions of country codes, see **Country Codes Table** in **Part 4**.

Phone Number

No entry

This field is system generated. This is the payroll office contact's telephone number.

Fax Number

No entry

This field is system generated. This is the payroll office contact's fax number.

Email Address

No entry

This field is system generated. This is the payroll office contact's e-mail address.

Remarks

No entry

This field is system generated. These are remarks about this record.

Last Changed

ID

No entry

This field is system generated. This is the user identification number of the individual who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change.

Time

No entry

This field is system generated. This is the time of the most recent change.

Personnel Office Contacts View Page Field Descriptions

The Personnel Office Contacts View page (**Figure 2:13**) displays a selected personnel office contact record. For instructions on using the Personnel Office Contacts View page, see **Viewing A Personnel Office Contact Record** in **Part 2**.

Payroll Office ID

No entry

This field is system generated. This is the payroll office identification number.

Personnel Office ID

No entry

This field is system generated. This is the personnel office identification number.

Type

No entry

This field is system generated. The **`General`** type code indicates the personnel office contact holds an administrative position. The **`Technical`** type code indicates the personnel office contact holds a technical position.

Role

No entry

This field is system generated. This is the title, position, etc., of the personnel office contact.

Name

No entry

This field is system generated. This is the name of the personnel office contact.

Address Line 1

No entry

This field is system generated. This is the first line of the personnel office contact's street or PO box address.

Address Line 2

No entry

This field is system generated. This is the second line of the personnel office contact's street or PO box address.

Address Line 3

No entry

This field is system generated. This is the third line of the personnel office contact's street or PO box address.

City

No entry

This field is system generated. This is the name of the personnel office contact's city.

Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.

State

No entry

This field is system generated. This is the personnel office contact's state, U.S. territory, or overseas military abbreviation. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory, And Overseas Military Abbreviations Table** in **Part 4**.

ZIP

No entry

This field is system generated. This is the personnel office contact's ZIP Code.

Country

No entry

This field is system generated. This is the personnel office contact's country code. For a list and descriptions of country codes, see **Country Codes Table** in **Part 4**.

Phone Number

No entry

This field is system generated. This is the personnel office contact's telephone number.

Fax Number

No entry

This field is system generated. This is the personnel office contact's fax number.

Email Address

No entry

This field is system generated. This is the personnel office contact's e-mail address.

Remarks

No entry

This field is system generated. These are remarks about this record.

Last Changed

ID

No entry

This field is system generated. This is the user identification number of the individual who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change.

Time

No entry

This field is system generated. This is the time of the most recent change.

Payroll Office Contacts Update Page Field Instructions

The Payroll Office Contacts Update page (**Figure 2:14**) is used to update a selected payroll office contact record. For instructions on using the Payroll Office Contacts Update page, see **Updating A Payroll Office Contact Record** in **Part 2**. For field instructions, see **Payroll Office Contacts Add Page Field Instructions** in **Part 3**.

Personnel Office Contacts Update Page Field Instructions

The Personnel Office Contacts Update page (**Figure 2:15**) is used to update a selected personnel office contact record. For instructions on using the Personnel Office Contacts Update page, see **Updating A Personnel Office Contact Record** in **Part 2**. For field instructions, see **Personnel Office Contacts Add Page Field Instructions** in **Part 3**.

Payroll Office Errors Page Field Instructions

The Payroll Office Errors page (**Figure 2:16**) is used to search for payroll office error statistics records by payroll office ID, year, etc. For instructions on using the Payroll Office Errors page, see **Viewing Payroll Office Error Records** in **Part 2**.

Payroll Office ID

Optional, alphanumeric, 8 positions

Type the payroll office identification number.

Year

Optional, alphanumeric, 4 positions

Type the reconciliation year for the requested error statistics.

Quarter

Optional, alphanumeric, 1 position

Type the reconciliation quarter for the requested error statistics.

Order By

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the ID sort option. To choose a sort option, select the radio button next to one of the following values:

`ID`	Sorts search results by payroll office ID.
`Year/Quarter`	Sorts search results by reconciliation year and reconciliation quarter.

Payroll Office Errors Search Results Page Field Descriptions

The Payroll Office Errors Search Results page (**Figure 2:17**) displays a list of payroll office error statistics records resulting from the search criteria entered on the Payroll Office Errors page (**Figure 2:16**). For instructions on using the Payroll Office Errors Search Results page, see **Viewing Payroll Office Error Records** in **Part 2**.

ID

No entry

This field is system generated. This is the payroll office identification number.

Year

No entry

This field is system generated. This is the reconciliation year for the requested error statistics.

Quarter

No entry

This field is system generated. This is the reconciliation quarter for the requested error statistics.

Records with Errors

No entry

This field is system generated. This is the total number of payroll office enrollee records with errors. Records with warnings are not included.

Records with Warnings

No entry

This field is system generated. This is the total number of payroll office records with warnings. Records with errors are not included.

Total Errors

No entry

This field is system generated. This is the total number of errors identified in the transmission file.

Total Warnings

No entry

This field is system generated. This is the total number of warnings identified in the transmission file.

Payroll Office Errors View Page Field Descriptions

The Payroll Office Errors View page (**Figure 2:18**) displays a selected payroll office error statistics record. For instructions on using the Payroll Office Errors View page, see **Viewing Payroll Office Error Records** in **Part 2**.

Payroll Office ID

No entry

This field is system generated. This is the payroll office identification number.

Year

No entry

This field is system generated. This is the reconciliation year for the requested error statistics.

Quarter

No entry

This field is system generated. This is the reconciliation quarter for the requested error statistics.

Records with Errors

No entry

This field is system generated. This is the total number of payroll office enrollee records with errors. Records with warnings are not included.

Records with Warnings

No entry

This field is system generated. This is the total number of payroll office records with warnings. Records with errors are not included.

Total Errors

No entry

This field is system generated. This is the total number of errors identified in the transmission file.

Total Warnings

No entry

This field is system generated. This is the total number of warnings identified in the transmission file.

Records Reconciled

No entry

This field is system generated. This is the count of records that have reconciliation reason and action codes entered for every error on the record.

Errors Reconciled

No entry

This field is system generated. This is the count of errors that have reconciliation reason and action codes entered.

Carrier Errors

No entry

This field is system generated. This is the count of errors that have reconciliation reason and action codes entered that indicate the carrier is at fault.

Disputed Errors

No entry

This field is system generated. This is the count of errors that have reconciliation reason and action codes entered that indicate the carrier is at fault and the carrier disputes the claim.

Confirmed Errors

No entry

This field is system generated. This is the count of errors that have reconciliation reason and action codes entered that indicate the carrier is at fault and the carrier accepts the claim.

Payroll Office Transmissions Page Field Instructions

The Payroll Office Transmissions page (**Figure 2:19**) is used to search for payroll office transmission records by payroll office ID, year, etc. For instructions on using the Payroll Office Transmissions page, see **Viewing Payroll Office Transmission Records** in **Part 2**.

Note: Entry of at least one optional field (e.g., Payroll Office ID, Year, etc.) is required for the search.

Payroll Office ID

Optional, alphanumeric, 8 positions

Type the payroll office identification number.

Year

Optional, alphanumeric, 4 positions

Type the reconciliation year for the requested transmission record.

Quarter

Optional, alphanumeric, 1 position

Type the reconciliation quarter for the requested transmission record.

Order By

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the ID sort option. To choose a sort option, select the radio button next to one of the following values:

`ID`	Sorts search results by payroll office ID.
`Year/Quarter`	Sorts search results by reconciliation year and reconciliation quarter.

Payroll Office Transmissions Search Results Page Field Descriptions

The Payroll Office Transmissions Search Results page (**Figure 2:20**) displays a list of payroll office transmission records resulting from the search criteria entered on the Payroll Office Transmissions page (**Figure 2:19**). For instructions on using the Payroll Office Transmissions Search Results page, see **Viewing Payroll Office Transmission Records** in **Part 2**.

ID

No entry

This field is system generated. This is the payroll office identification number.

Year

No entry

This field is system generated. This is the reconciliation year for the requested transmission record.

Quarter

No entry

This field is system generated. This is the reconciliation quarter for the requested transmission record.

Submission

No entry

This field is system generated. Each transmission file submitted for the reconciliation quarter is assigned a sequential submission number.

Submission Date

No entry

This field is system generated. This is the date the transmission file was submitted.

Amount Sent

No entry

This field is system generated. This is the total withholding/premium amounts sent, as indicated on the transmission file header record.

Amount Received

No entry

This field is system generated. This is the total withholding/premium amounts received.

Code

No entry

This field is system generated. This is the transmission processing code. **Initial** indicates an initial transmission file, **Additional** indicates an addition to the transmission file, and **Replace** indicates a replacement of the transmission file.

Status

No entry

This field is system generated. This field displays **000** for an accepted transmission; otherwise, a payroll office system code is displayed. It indicates the status of a payroll office enrollment data transmission. For a list and descriptions of payroll office system codes, see **Payroll Office System Codes Table** in **Part 4**.

Payroll Office Transmissions View Page Field Descriptions

The Payroll Office Transmissions View page (**Figure 2:21**) displays a selected payroll office transmission record. For instructions on using the Payroll Office Transmissions View page, see **Viewing Payroll Office Transmission Records** in **Part 2**.

Payroll Office ID

No entry

This field is system generated. This is the payroll office identification number.

Year

No entry

This field is system generated. This is the reconciliation year for the requested transmission record.

Quarter

No entry

This field is system generated. This is the reconciliation quarter for the requested transmission record.

Submission

No entry

This field is system generated. Each transmission file submitted for the reconciliation quarter is assigned a sequential submission number.

Submission Date

No entry

This field is system generated. This is the date the transmission file was submitted.

As of Date

No entry

This field is system generated. This is the date the transmitted enrollment data was extracted from the payroll/personnel office database.

Records Sent

No entry

This field is system generated. This is the number of records sent in the transmission.

Records Received

No entry

This field is system generated. This is the number of records found in the transmission file during processing.

Records Processed

No entry

This field is system generated. This is the number of records accepted to store in the CLER tables.

Amount Sent

No entry

This field is system generated. This is the total withholding/premium amounts sent, as indicated on the transmission file header record.

Amount Received

No entry

This field is system generated. This is the total withholding/premium amounts received.

Date Processed

No entry

This field is system generated. This is the current system date when the process was run.

Time Processed

No entry

This field is system generated. This is the current system time when the process was run.

Code

No entry

This field is system generated. This is the transmission processing code. The code **I** or blank represent an initial file, code **A** represents additional, and code **R** represents replace all previous.

Status

No entry

This field is system generated. This field displays **000** for an accepted transmission; otherwise, a payroll office system code is displayed. It indicates the status of a payroll office enrollment data transmission. For a list and descriptions of payroll office system codes, see **Payroll Office System Codes Table** in **Part 4**.

Source

No entry

This field is system generated. This is the source of transmission data indicator. The value in the first position equals **M** for mainframe or **S** for server. The value in the second position equals **T** for transmission or **M** for manual entry.

Email Date

No entry

This field is system generated. This is the date the last e-mail was sent to this submitter as a reminder to send a transmission for the current reconciliation quarter.

Email Time

No entry

This field is system generated. This is the time the last e-mail was sent to this submitter as a reminder to send a transmission for the current reconciliation quarter.

Payroll Office Enrollees Page Field Instructions

The Payroll Office Enrollees page (**Figure 2:22**) is used to search for payroll office enrollee records by payroll office ID, year, etc. For instructions on using the Payroll Office Enrollees page, see **Maintaining Payroll Office Enrollee Records** in **Part 2**.

Note: Entry of at least two optional fields (e.g., Agency, POI, etc.) is required for the search, unless you complete the **entire** SSN or Other ID field, in which case, no other entries are needed.

Payroll Office ID

Required

Click the drop-down menu and select the payroll office identification number.

Year

Optional default

Click the drop-down menu and select the reconciliation year. If no year is selected, this field defaults to the current reconciliation year.

Quarter

Optional default

Click the drop-down menu and select the reconciliation quarter. If no quarter is selected, this field defaults to the current reconciliation quarter.

Agency

Optional, alphanumeric, 4 positions

Type the agency identification code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

POI

Optional, alphanumeric, 4 positions

Type the personnel office identifier of the office where the enrollee's records are maintained.

Carrier

Optional, alphanumeric, 4 positions

Type the carrier code.

Enrollment Code

Optional, alphanumeric, 3 positions

Type the enrollment code.

SSN

To search for a specific enrollee record by social security number (SSN), or to search for a range of enrollee records by a range of SSNs, complete the fields as described below.

Note: A search for enrollee records by **complete** enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency, POI, etc.) on this page.

From

Optional, numeric, 9 positions max.

To search for a specific enrollee record by SSN, type the SSN and skip the To field.

To search for a range of enrollee records by a range of SSNs, type the SSN that starts the range, then go to the To field.

To

Optional, numeric, 9 positions max.

When searching for a range of enrollee records by a range of SSNs, type the SSN that ends the range; otherwise, leave blank.

Other ID

These fields are used by the Retirement Services Program (RSP) and Office of Workers' Compensation Programs (OWCP). RSP personnel use these fields to search for enrollee records by civil service annuitant (CSA) or civil service final (CSF) identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.

Note: A search for enrollee records by **complete** Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency, POI, etc.) on this page.

From

Optional, alphanumeric, 15 positions max.

To search for a specific enrollee record by Other ID, type the Other ID and skip the To field.

To search for a range of enrollee records by a range of Other IDs, type the Other ID that starts the range, then go to the To field.

Note for RSP: Type the CSA or CSF identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXXX, and the CSF identifier is typed as FXXXXXXXX.

To

Optional, alphanumeric, 15 positions max.

When searching for a range of enrollee records by a range of Other IDs, type the Other ID that ends the range; otherwise, leave blank.

Last Name

Optional, alphanumeric, 25 positions max.

Type the enrollee's last name. If the enrollee has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III). If there is a case of an enrollee having only one name, enter that one name in this field.

First Name

Optional, alphanumeric, 12 positions max.

Type the enrollee's first name. This must be provided with the exception of when an enrollee has only one name.

Middle Name

Optional, alphanumeric, 12 positions max.

Type the enrollee's middle name.

Error Code

Optional

Click the arrows to locate the applicable error code on the list and select this code. For a list and descriptions of error codes, see **Discrepancy Codes Table** in **Part 4**.

Warning Code

Optional

Click the applicable warning code from the list. For a list and descriptions of warning codes, see **Warning Codes Table** in **Part 4**.

Display

Optional default

This field allows users to display search results by the options listed below. If no display option is selected, this field automatically defaults to the All Records option. To choose a display option, select the radio button next to one of the following values:

All Records	Displays all records related to the search criteria.
Matches	Displays all matched records related to the search criteria.
No Matches	Displays records with no matches related to the search criteria. No matches are discrepancies where the carrier record is not found.
Discrepancies	Displays all records with discrepancies related to the search criteria.
Warnings	Displays all records with warnings related to the search criteria.
Unreconciled	Displays all records with unreconciled discrepancies related to the search criteria. Unreconciled discrepancies are discrepancies where the payroll office has not entered a reconciliation reason or reconciliation action code.
Reconciled	Displays all records with reconciled discrepancies related to the search criteria.
Confirmed	Displays all records with confirmed discrepancies related to the search criteria. Confirmed discrepancies are discrepancies where the carrier is in agreement with the payroll office's reconciliation reason and reconciliation action.
Disputed	Displays all records with disputed discrepancies related to the search criteria. Disputed discrepancies are discrepancies where the carrier is not in agreement with the payroll office's reconciliation reason and reconciliation action.
Not Validated	Displays all records with discrepancies that are not validated. Not Validated discrepancies are discrepancies that the carrier has not yet agreed that the agency's reconciliation reason and actions are correct.

Order By

1st

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the Name sort option. To choose a sort option, click the drop-down menu and select one of the following options to display the selected criteria in first sort search order:

Agency	Sorts search results by agency identification code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process.

Name	Sorts search results by enrollee name.
Pers. Office ID	Sorts search results by personnel office identification number.
SSNO	Sorts search results by enrollee social security number.
Other ID	Sorts search results by the identifier used by RSP/OWCP to identify the enrollee.

2nd

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the SSNO sort option. To choose a sort option, click the drop-down menu and select one of the following options to display the selected criteria in second sort search order:

Agency	Sorts search results by agency identification code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
Pers. Office ID	Sorts search results by personnel office identification number.
SSNO	Sorts search results by enrollee social security number.
Other ID	Sorts search results by the identifier used by RSP/OWCP to identify the enrollee.

3rd

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in third sort search order:

Agency	Sorts search results by agency identification code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
Pers. Office ID	Sorts search results by personnel office identification number.
SSNO	Sorts search results by enrollee social security number.
Other ID	Sorts search results by the identifier used by RSP/OWCP to identify the enrollee.

4th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in fourth sort search order:

Agency	Sorts search results by agency identification code.
Carrier	Sorts search results by carrier code.

Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
Pers. Office ID	Sorts search results by personnel office identification number.
SSNO	Sorts search results by enrollee social security number.
Other ID	Sorts search results by the identifier used by RSP/OWCP to identify the enrollee.

5th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in fifth sort search order:

Agency	Sorts search results by agency identification code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
Pers. Office ID	Sorts search results by personnel office identification number.
SSNO	Sorts search results by enrollee social security number.
Other ID	Sorts search results by the identifier used by RSP/OWCP to identify the enrollee.

6th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in sixth sort search order:

Agency	Sorts search results by agency identification code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a discrepancy or warning record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
Pers. Office ID	Sorts search results by personnel office identification number.
SSNO	Sorts search results by enrollee social security number.
Other ID	Sorts search results by the identifier used by RSP/OWCP to identify the enrollee.

Payroll Office Enrollees Search Results Page Field Descriptions

The Payroll Office Enrollees Search Results page (**Figure 2:23**) displays a list of payroll office enrollee records resulting from the search criteria entered on the Payroll Office Enrollees page (**Figure 2:22**). For instructions on using the Payroll Office Enrollees Search Results page, see **Maintaining Payroll Office Enrollee Records** in **Part 2**.

Note: The Payroll Office Enrollees Search Results (Other ID) page (**Figure 2:24**) is displayed when **24900002**, **24900003**, or **160099XX** is entered in the Payroll Office ID field on the Payroll Office Enrollees page.

Payroll Office ID

No entry

This field is system generated. This is the payroll office identification number.

Year

No entry

This field is system generated. This is the reconciliation year.

Quarter

No entry

This field is system generated. This is the reconciliation quarter.

Other ID

No entry

This field is system generated. This field is used by the Retirement Services Program (RSP) and Office of Workers' Compensation Programs (OWCP). RSP personnel use this field to reference an enrollee's civil service annuitant or civil service final identifier. OWCP personnel use this field to reference an enrollee's claim identifier.

Note: The Agency and POI fields are displayed in lieu of this field when a payroll office identification number other than **24900002**, **24900003**, or **160099XX** is entered in the Payroll Office ID field on the Payroll Office Enrollees page.

Enrollee SSN

No entry

This field is system generated. This is the enrollee's social security number.

Last Name

No entry

This field is system generated. This is the enrollee's last name.

First Name

No entry

This field is system generated. This is the enrollee's first name.

Carrier

No entry

This field is system generated. This is the carrier code.

Code

No entry

This field is system generated. This is the enrollment code.

Agency

No entry

This field is system generated. This is the agency identification code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

Note: The Other ID field is displayed in lieu of this field when **24900002**, **24900003**, or **160099XX** is entered in the Payroll Office ID field on the Payroll Office Enrollees page.

POI

No entry

This field is system generated. This is the personnel office identifier of the office where the enrollee's records are maintained.

Note: The Other ID field is displayed in lieu of this field when **24900002**, **24900003**, or **160099XX** is entered in the Payroll Office ID field on the Payroll Office Enrollees page.

Discrepancies

No entry

This field is system generated. This code identifies an error or warning. For lists and descriptions of error and warning codes, see **Discrepancy Codes Table** and **Warning Codes Table** in **Part 4**.

Note: Check marks are displayed next to discrepancy codes that have been addressed by agencies and carriers. Red check marks are displayed next to discrepancies that agencies addressed by selecting the appropriate reconciliation action and reason codes on the Payroll Office Enrollees Reconcile page. Green check marks are displayed next to discrepancies that have been addressed by carriers. To display the most current check marks, click **[Refresh]** at the top of the Payroll Office Enrollees Search Results page.

Fail Count

No entry

This field is system generated. This is the number of times this record has failed the quarterly edit process.

Payroll Office Enrollees View Page Field Descriptions

The Payroll Office Enrollees View page (**Figure 2:25**) displays a selected payroll office enrollee record. For instructions on using the Payroll Office Enrollees View page, see **Viewing A Payroll Office Enrollee Record** in **Part 2**.

Payroll Office ID

No entry

This field is system generated. This is the payroll office identification number.

Year

No entry

This field is system generated. This is the reconciliation year.

Quarter

No entry

This field is system generated. This is the reconciliation quarter.

Submission

No entry

This field is system generated. This is the transmission submission for this enrollee record.

Agency

No entry

This field is system generated. This is the agency identification code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

POI

No entry

This field is system generated. This is the personnel office identifier of the office where the enrollee's records are maintained.

Carrier

No entry

This field is system generated. This is the carrier code.

Enrollment Code

No entry

This field is system generated. This is the enrollee's enrollment code.

SSN

No entry

This field is system generated. This is the enrollee's social security number.

Last Name

No entry

This field is system generated. This is the enrollee's last name.

First Name

No entry

This field is system generated. This is the enrollee's first name.

Middle Name

No entry

This field is system generated. This is the enrollee's middle name.

Effective Date

No entry

This field is system generated. This is the effective date of the enrollment.

Amount

No entry

This field is system generated. This the enrollee's withholding/premium per pay period.

Deceased Annuitant SSN

No entry

This field is system generated. This is the deceased annuitant enrollee's social security number.

Pseudo SSN

No entry

This field is system generated. This is the pseudo social security number used by the agency and carrier to identify the enrollee.

Other Payroll ID

No entry

This field is system generated. This is an identifier used by the agency to identify the enrollee.

Other Carrier ID

No entry

This field is system generated. This is an identifier used by the carrier to identify the enrollee.

Submitter Use #1

No entry

This field is system generated. These are remarks that were entered by the organization that created the record.

Submitter Use #2

No entry

This field is system generated. These are remarks that were entered by the organization that created the record.

Submitter Use #3

No entry

This field is system generated. These are remarks that were entered by the organization that created the record.

Date Processed

No entry

This field is system generated. This is the date the record was processed.

Time Processed

No entry

This field is system generated. This is the time the record was processed.

Source

No entry

This field is system generated. This is the source of transmission data indicator. The value in the first position equals **M** for mainframe or **S** for server. The value in the second position equals **T** for transmission or **M** for manual entry.

Fail Count

No entry

This field is system generated. This is the number of times this record has failed a quarterly edit process.

Select Another Discrepancy

Optional

If multiple discrepancies are shown, click each discrepancy number to view the corresponding code and message.

Discrepancy

No entry

►This field is system generated. The discrepancy code identifies an error or warning. A short description is displayed next to the code. To view a detailed explanation of the discrepancy code, click **[Explain]** or see **Discrepancy Codes Table** in **Part 4**. If Discrepancy Code 165 or 167 is displayed in the Discrepancy field, the **[Duplicate]** button is also displayed. Click **[Duplicate]** to display the duplicate payroll office enrollee record for this enrollee record.◄

Reconciliation Reason

No entry

►This field is system generated. This code identifies the cause of a discrepancy as reported by the agency. A short description is displayed next to the code. To view a detailed explanation of the reconciliation reason code, click **[Explain]** or see **Reconciliation Reason Codes Table** in **Part 4**.◄

Reconciliation Action

No entry

►This field is system generated. This code identifies the action requested by the agency to resolve a discrepancy. A short description is displayed next to the code. To view a detailed explanation of the reconciliation action code, click **[Explain]** or see **Reconciliation Action Codes Table** in **Part 4**.◄

Corrective Action

No entry

►This field is system generated. This code identifies the carrier's response to the reconciliation action code displayed in the Reconciliation Action field. A short description is displayed next to the code. To view a detailed explanation of the carrier's corrective action response code, click **[Explain]** or see **Carrier Corrective Action Response Codes Table** in **Part 4**.◄

Payroll Office Comments

No entry

This field is system generated. These are the agency's comments.

Carrier Comments

No entry

This field is system generated. These are the carrier's comments.

Last Payroll Update

ID

No entry

This field is system generated. This is the user identification number of the payroll office representative who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change.

Time

No entry

This field is system generated. This is the time of the most recent change.

Last Carrier Update

ID

No entry

This field is system generated. This is the user identification number of the carrier representative who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change.

Time

No entry

This field is system generated. This is the time of the most recent change.

Payroll Office Enrollees Reconcile Page Field Instructions

The Payroll Office Enrollees Reconcile page (**Figure 2:28**) is used to reconcile payroll office enrollee data on a selected record. For instructions on using the Payroll Office Enrollees Reconcile page, see **Reconciling A Payroll Office Enrollee Record** in **Part 2**.

Payroll Office ID

No entry

This field is system generated. This is the payroll office identification number.

Year

No entry

This field is system generated. This is the reconciliation year.

Quarter

No entry

This field is system generated. This is the reconciliation quarter.

Submission

No entry

This field is system generated. This is the transmission submission for this record.

Agency

No entry

This field is system generated. This is the agency identification code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

POI

No entry

This field is system generated. This is the personnel office identifier of the office where the enrollee's records are maintained.

Carrier

No entry

This field is system generated. This is the carrier code.

Enrollment Code

No entry

This field is system generated. This is the enrollee's enrollment code.

SSN

No entry

This field is system generated. This is the enrollee's social security number.

Last Name

No entry

This field is system generated. This is the enrollee's last name.

First Name

No entry

This field is system generated. This is the enrollee's first name.

Middle Name

No entry

This field is system generated. This is the enrollee's middle name.

Effective Date

No entry

This field is system generated. This is the effective date of the enrollment.

Amount

No entry

This field is system generated. This is the withholding/premium per pay period.

Deceased Annuitant SSN

No entry

This field is system generated. This is the deceased annuitant enrollee's social security number.

Pseudo SSN

No entry

This field is system generated. This is the pseudo social security number used by the agency and carrier to identify the enrollee.

Other Payroll ID

No entry

This field is system generated. This is an identifier used by the agency to identify the enrollee.

Other Carrier ID

No entry

This field is system generated. This is an identifier used by the carrier to identify the enrollee.

Submitter Use #1

No entry

This field is system generated. These are remarks that were entered by the organization that created the record.

Submitter Use #2

No entry

This field is system generated. These are remarks that were entered by the organization that created the record.

Submitter Use #3

No entry

This field is system generated. These are remarks that were entered by the organization that created the record.

Date Processed

No entry

This field is system generated. This is the date the record was processed.

Time Processed

No entry

This field is system generated. This is the time the record was processed

Source

No entry

This field is system generated. This is the source of transmission indicator. The value in the first position equals **M** for mainframe or **S** for server. The value in the second position equals **T** for transmission or **M** for manual entry.

Fail Count

No entry

This field is system generated. This is the number of times this record has failed a quarterly edit process.

Select Another Discrepancy

Optional

If multiple discrepancies are shown, click each discrepancy number to view the corresponding code and message.

Discrepancy

No entry

►This field is system generated. The discrepancy code identifies an error or warning. A short description is displayed next to the code. To view a detailed explanation of the discrepancy code, click **[Explain]** or see **Discrepancy Codes Table** in **Part 4**.◄

Reconciliation Reason

Required

►Click the drop-down menu and select the code that identifies the cause of the discrepancy. A short description is displayed next to the code. To view a detailed explanation of the reconciliation reason code, see **Reconciliation Reason Codes Table** in **Part 4**. If the enrollee record is reconciled, the **[Explain]** button is displayed next to the code. Click **[Explain]** to display a detailed explanation of the code.◄

Reconciliation Action

Required

►Click the drop-down menu and select the code that identifies the action requested to resolve the discrepancy. A short description is displayed next to the code. To view a detailed explanation of the reconciliation action code, see **Reconciliation Action Codes Table** in **Part 4**. If the enrollee record is reconciled, the **[Explain]** button is displayed next to the code. Click **[Explain]** to display a detailed explanation of the code.◄

Corrective Action

No entry

►This field is system generated. This code identifies the carrier's response to the reconciliation action code listed in the Reconciliation Action field. A short description is displayed next to the code. To view a detailed explanation of the carrier's corrective action response code, click **[Explain]** or see **Carrier Corrective Action Response Codes Table** in **Part 4**.◄

Payroll Office Comments

Conditional, alphanumeric, 400 positions max.

Type comments about this record.

Note: If **580** was selected in the Reconciliation Reason field, comments explaining the reconciliation reason must be entered in this field.

Carrier Comments

No entry

This field is system generated. These are the carrier's comments about this record.

Last Payroll Update

ID

No entry

This field is system generated. This is the user identification number of the payroll office representative who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change made to the record by the payroll office.

Time

No entry

This field is system generated. This is the time of the most recent change made to the record by the payroll office.

Last Carrier Update

ID

No entry

This field is system generated. This is the user identification number of the carrier representative who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change made to the record by the carrier.

Time

No entry

This field is system generated. This is the time of the most recent change made to the record by the carrier.

Carrier Field Descriptions And Instructions

This section presents the following topics:

Carrier Information Page Field Instructions

The Carrier Information page (**Figure 2:30**) is used to search for carrier information records by carrier code, name, etc. For instructions on using the Carrier Information page, see Viewing Carrier Information Records in **Part 2**.

Carrier

Optional, alphanumeric, 4 positions

Type the carrier code.

Name

Optional, alphanumeric, 40 positions max.

Type the name of the carrier.

City

Optional, alphanumeric, 25 positions max

Type the name of the carrier’s city.

Note: If the address is an overseas military address, type FPO for fleet post office or APO for army post office in lieu of the city.

State

Optional

Click the drop-down menu and select carrier's state, U.S. territory, or overseas military abbreviation. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory, And Overseas Military Abbreviations Table** in **Part 4**.

Order By

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the Carrier sort option. To choose a sort option, select the radio button next to one of the following values:

`Carrier`	Sorts search results by carrier code.
`Name`	Sorts search results by name.
`City`	Sorts search results by city.
`State`	Sorts search results by state.

Carrier Information Search Results Page Field Descriptions

The Carrier Information Search Results page (**Figure 2:31**) displays a list of carrier information records resulting from the search criteria entered on the Carrier Information page (**Figure 2:30**). For instructions on using the Carrier Information Search Results page, see **Viewing Carrier Information Records** in **Part 2**.

Carrier

No entry

This field is system generated. This is the carrier code.

Name

No entry

This field is system generated. This is the name of the carrier.

Address

No entry

This field is system generated. This is the carrier's street or PO box address.

City

No entry

This field is system generated. This is the name of the carrier's city.

Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.

State

No entry

This field is system generated. This is the carrier's state, U.S. territory, or overseas military abbreviation. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory, And Overseas Military Abbreviations Table** in **Part 4**.

ZIP

No entry

This field is system generated. This is the carrier's ZIP Code.

Carrier Information View Page Field Descriptions

The Carrier Information View page (**Figure 2:32**) displays a selected carrier information record. For instructions on using the Carrier Information View page, see **Viewing Carrier Information Records** in **Part 2**.

Carrier

No entry

This field is system generated. This is the carrier code.

Name

No entry

This field is system generated. This is the name of the carrier.

Address Line 1

No entry

This field is system generated. This is the first line of the carrier's street or PO box address.

Address Line 2

No entry

This field is system generated. This is the second line of the carrier's street or PO box address.

Address Line 3

No entry

This field is system generated. This is the third line of the carrier's street or PO box address.

City

No entry

This field is system generated. This is the name of the carrier's city.

Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.

State

No entry

This field is system generated. This is the carrier's state, U.S. territory, or overseas military abbreviation. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory , And Overseas Military Abbreviations Table** in **Part 4**.

ZIP

No entry

This field is system generated. This is the carrier's ZIP Code.

Country

No entry

This field is system generated. This is the carrier's country code. For a list and descriptions of country codes, see **Country Codes Table** in **Part 4**.

Start Date

No entry

This field is system generated. This is the first date the carrier will be valid.

End Date

No entry

This field is system generated. This is the last date the carrier will be valid.

Last Changed

ID

No entry

This field is system generated. This is the user identification number of the individual who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change.

Time

No entry

This field is system generated. This is the time of the most recent change.

Carrier Identifiers Page Field Instructions

The Carrier Identifiers page (**Figure 2:33**) is used to search for carrier identification records by carrier ID. For instructions on using the Carrier Identifiers page, see **Viewing Carrier ID Records** in **Part 2**.

Carrier ID

Optional, alphanumeric, 7 positions

Type the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit.

Carrier Identifiers Search Results Page Field Descriptions

The Carrier Identifiers Search Results page (**Figure 2:34**) displays a list of carrier identifier records resulting from the search criteria entered on the Carrier Identifiers page (**Figure 2:33**). For instructions on using the Carrier Identifiers Search Results page, see **Viewing Carrier ID Records** in **Part 2**.

Carrier ID

No entry

This field is system generated. This is the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit.

Name

No entry

This field is system generated. This is the name of the carrier.

Start Date

No entry

This field is system generated. This is the first date (MMDDYYYY) the carrier plan will be valid. If the date is not known, 01/01/2001 is displayed.

End Date

No entry

This field is system generated. This is the last date (MMDDYYYY) the carrier plan will be valid. If the date is not known, 12/31/9999 is displayed.

Carrier Identifiers View Page Field Descriptions

The Carrier Identifiers View page (**Figure 2:35**) displays a selected carrier identifier record. For instructions on using the Carrier Identifiers View page, see **Viewing Carrier ID Records** in **Part 2**.

Carrier ID

No entry

This field is system generated. This is the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit.

Start Date

No entry

This field is system generated. This is the first date (MMDDYYYY) the carrier plan will be valid. If the date is not known, 01/01/2001 is displayed.

End Date

No entry

This field is system generated. This is the last date (MMDDYYYY) the carrier plan will be valid. If the date is not known, 12/31/9999 is displayed.

Error Threshold

No entry

This field is system generated. This is the number or percentage of errors permitted for the carrier before a transmission file is rejected.

Threshold Type

No entry

This field is system generated. This is the threshold type. Type **P** indicates percent and type **N** indicates a number as a measure of error threshold.

Last Changed

ID

No entry

This field is system generated. This is the user identification number of the individual who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change.

Time

No entry

This field is system generated. This is the time of the most recent change.

Carrier Enrollment Codes Page Field Instructions

The Carrier Enrollment Codes page (**Figure 2:36**) is used to search for carrier enrollment code records by carrier code, enrollment code, etc. Only NFC's CLER Operations and Reconciliation Unit has the authority to add, update, and delete carrier enrollment codes. For instructions on using the Carrier Enrollment Codes page, see **Viewing Carrier Enrollment Code Records** in **Part 2**.

Carrier

Optional, alphanumeric, 4 positions

Type the carrier code.

Enrollment Code

Optional, alphanumeric, 3 positions

Type the carrier enrollment code.

Order By

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the Carrier sort option. To choose a sort option, select the radio button next to one of the following values:

Carrier	Sorts search results by carrier code.
Code	Sorts search results by carrier enrollment code.

Carrier Enrollment Codes Search Results Page Field Descriptions

The Carrier Enrollment Codes Search Results page (**Figure 2:37**) displays a list of carrier enrollment code records resulting from the search criteria entered on the Carrier Enrollment Codes page (**Figure 2:36**). For instructions on using the Carrier Enrollment Codes Search Results page, see **Viewing Carrier Enrollment Code Records** in **Part 2**.

Carrier

No entry

This field is system generated. This is the carrier identification code.

►Region

No entry

This field is system generated. This is the carrier's enrollment data transmission location code assigned by NFC's CLER Operations and Reconciliation Unit.◄

Code

No entry

This field is system generated. This is the carrier enrollment code.

Name

No entry

This field is system generated. This is the name of the carrier.

Start Date

No entry

This field is system generated. This is the first date the carrier enrollment code will be valid.

End Date

No entry

This field is system generated. This is the last date the carrier enrollment code will be valid.

CLER Field Descriptions And Instructions

Carrier Enrollment Codes View Page Field Descriptions

The Carrier Enrollment Codes View page (**Figure 2:38**) displays a selected carrier enrollment code record. For instructions on using the Carrier Enrollment Codes View page, see **Viewing Carrier Enrollment Code Records** in **Part 2**.

Carrier

No entry

This field is system generated. This is the carrier code.

►Region

No entry

This field is system generated. This is the carrier's enrollment data transmission location code assigned by NFC's CLER Operations and Reconciliation Unit.◄

Enrollment Code

No entry

This field is system generated. This is the carrier enrollment code.

Start Date

No entry

This field is system generated. This is the first date the carrier enrollment code will be valid.

End Date

No entry

This field is system generated. This is the last date the carrier enrollment code will be valid.

Last Changed

ID

No entry

This field is system generated. This is the user identification number of the individual who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change.

Time

No entry

This field is system generated. This is the time of the most recent change.

Carrier Contacts Page Field Instructions

The Carrier Contacts page (**Figure 2:40**) is used to search for carrier contact records by carrier ID, type code, etc. For instructions on using the Carrier Contacts page, see **Viewing Carrier And Carrier Plan Contact Records** in **Part 2**.

Carrier ID

Optional, alphanumeric, 7 positions

Type the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit.

Type

Optional

The Type code indicates whether the carrier contact is an administrative contact or a technical contact. To select the Type code, click the drop-down menu and select either **`General`** for an administrative contact or **`Technical`** for a technical contact.

Display

Optional default

This field allows users to display search results by the options listed below. If no display option is selected, this field automatically defaults to the All display option. To choose a display option, select the radio button next to one of the following values:

`All`	Displays all contacts for carrier ID and type code entered.
`Active`	Displays active contacts for carrier ID and type code entered.
`Inactive`	Displays inactive contacts for carrier ID and type code entered.

Order By

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the ID sort option. To choose a sort option, select the radio button next to one of the following values:

`ID`	Sorts search results by carrier ID.
`Type`	Sorts search results by type code.

Carrier Plan Contacts Page Field Instructions

The Carrier Plan Contacts page (**Figure 2:43**) is used to search for carrier plan contact records by carrier identification code, plan, etc. For instructions on using the Carrier Plan Contacts page, see **Viewing Carrier And Carrier Plan Contact Records** in **Part 2**.

Carrier

Optional, alphanumeric, 7 positions

Type the carrier identification code.

Plan

Optional, alphanumeric, 2 positions

Type the first two positions of the carrier enrollment code.

Type

Optional

The Type code indicates whether the carrier plan contact is an administrative contact or a technical contact. To select the Type code, click the drop-down menu and select either **`General`** for an administrative contact or **`Technical`** for a technical contact.

Display

Optional default

This field allows users to display search results by the options listed below. If no display option is selected, this field automatically defaults to the All display option. To choose a display option, select the radio button next to one of the following values:

`All`	Displays all contacts for carrier code and type code entered.
`Active`	Displays active contacts for carrier code and type code entered.
`Inactive`	Displays inactive contacts for carrier code and type code entered.

Order By

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the Carrier sort option. To choose a sort option, select the radio button next to one of the following values:

`Carrier`	Sorts search results by carrier code.
`Plan`	Sorts search results by plan code.
`Type`	Sorts search results by type code.

Carrier Contacts Search Results Page Field Descriptions

The Carrier Contacts Search Results page (**Figure 2:41**) displays a list of carrier contact records resulting from the search criteria entered on the Carrier Contacts page (**Figure 2:40**). For instructions on using the Carrier Contacts Search Results page, see **Viewing Carrier And Carrier Plan Contact Records** in **Part 2**.

Carrier ID

No entry

This field is system generated. This is the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit.

Type

No entry

This field is system generated. The **`General`** type code indicates the carrier contact holds an administrative position. The **`Technical`** type code indicates the carrier contact holds a technical position.

Status

No entry

This field is system generated. **`Active`** indicates that the record has been activated in CLER. **`Inactive`** indicates that the record has been inactivated in CLER.

Name

No entry

This field is system generated. This is the name of the carrier contact.

Phone

No entry

This field is system generated. This is the carrier contact's telephone number.

Email

No entry

This field is system generated. This is the carrier contact's e-mail address.

Carrier Plan Contacts Search Results Page Field Descriptions

The Carrier Plan Contacts Search Results page (**Figure 2:44**) displays a list of carrier plan contact records resulting from the search criteria entered on the Carrier Plan Contacts page (**Figure 2:43**). For instructions on using the Carrier Plan Contacts Search Results page, see **Viewing Carrier And Carrier Plan Contact Records** in **Part 2**.

Carrier

No entry

This field is system generated. This is the carrier identification code.

Plan

No entry

This field is system generated. This is the first two positions of the carrier enrollment code.

Type

No entry

This field is system generated. The **General** type code indicates the carrier plan contact holds an administrative position. The **Technical** type code indicates the carrier plan contact holds a technical position.

Status

No entry

This field is system generated. **Active** indicates that the record has been activated in CLER. **Inactive** indicates that the record has been inactivated in CLER.

Name

No entry

This field is system generated. This is the name of the carrier plan contact.

Phone

No entry

This field is system generated. This is the carrier plan contact's telephone number.

Email

No entry

This field is system generated. This is the carrier plan contact's e-mail address.

Carrier Contacts View Page Field Descriptions

The Carrier Contacts View page (**Figure 2:42**) displays a selected carrier contact record. For instructions on using the Carrier Contacts View page, see **Viewing A Carrier Contact Record** in **Part 2**.

Carrier ID

No entry

This field is system generated. This is the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit.

Type

No entry

This field is system generated. The **General** type code indicates the carrier contact holds an administrative position. The **Technical** type code indicates the carrier contact holds a technical position.

Role

No entry

This field is system generated. This is the title, position, etc., of the carrier contact.

Name

No entry

This field is system generated. This is the name of the carrier contact.

Address Line 1

No entry

This field is system generated. This is the first line of the carrier contact's street or PO box address.

Address Line 2

No entry

This field is system generated. This is the second line of the carrier contact's street or PO box address.

Address Line 3

No entry

This field is system generated. This is the third line of the carrier contact's street or PO box address.

City

No entry

This field is system generated. This is the name of the carrier contact's city.

Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.

State

No entry

This field is system generated. This is the carrier contact's state, U.S. territory, or overseas military abbreviation. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory, And Overseas Military Abbreviations Table** in **Part 4**.

ZIP

No entry

This field is system generated. This is the carrier contact's ZIP Code.

Country

No entry

This field is system generated. This is the carrier contact's country code. For a list and descriptions of country codes, see **Country Codes Table** in **Part 4**.

Phone Number

No entry

This field is system generated. This is the carrier contact's telephone number.

Fax Number

No entry

This field is system generated. This is the carrier contact's fax number.

Email Address

No entry

This field is system generated. This is the carrier contact's e-mail address.

Remarks

No entry

This field is system generated. These are remarks about this record.

Last Changed

ID

No entry

This field is system generated. This is the user identification number of the individual who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change.

Time

No entry

This field is system generated. This is the time of the most recent change.

Carrier Plan Contacts View Page Field Descriptions

The Carrier Plan Contacts View page (**Figure 2:45**) displays a selected carrier plan contact record. For instructions on using the Carrier Plan Contacts View page, see **Viewing A Carrier Plan Contact Record** in **Part 2**.

Carrier

No entry

This field is system generated. This is the carrier identification code.

Plan

No entry

This field is system generated. This is the first two positions of the carrier enrollment code.

Type

No entry

This field is system generated. The **`General`** type code indicates the carrier plan contact holds an administrative position. The **`Technical`** type code indicates the carrier plan contact holds a technical position.

Role

No entry

This field is system generated. This is the title, position, etc., of the carrier plan contact.

Name

No entry

This field is system generated. This is the name of the carrier plan contact.

Address Line 1

No entry

This field is system generated. This is the first line of the carrier plan contact's street or PO box address.

Address Line 2

No entry

This field is system generated. This is the second line of the carrier plan contact's street or PO box address.

Address Line 3

No entry

This field is system generated. This is the third line of the carrier plan contact's street or PO box address.

City

No entry

This field is system generated. This is the name of the carrier plan contact's city.

Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.

State

No entry

This field is system generated. This is the carrier plan contact's state, U.S. territory, or overseas military abbreviation. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory, And Overseas Military Abbreviations Table** in **Part 4**.

ZIP

No entry

This field is system generated. This is the carrier plan contact's ZIP Code.

Country

No entry

This field is system generated. This is the carrier plan contact's country code. For a list and descriptions of country codes, see **Country Codes Table** in **Part 4**.

Phone Number

No entry

This field is system generated. This is the carrier plan contact's telephone number.

Fax Number

No entry

This field is system generated. This is the carrier plan contact's fax number.

Email Address

No entry

This field is system generated. This is the carrier plan contact's e-mail address.

Remarks

No entry

This field is system generated. These are remarks about this record.

Last Changed

ID

No entry

This field is system generated. This is the user identification number of the individual who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change.

Time

No entry

This field is system generated. This is the time of the most recent change.

Carrier Transmissions Page Field Instructions

The Carrier Transmissions page (**Figure 2:46**) is used to search for carrier transmission records by carrier ID, year, etc. For instructions on using the Carrier Transmissions page, see **Viewing Carrier Transmission Records** in **Part 2**.

Note: Entry of at least one optional field (e.g., Carrier ID, Year, etc.) is required for the search.

Carrier ID

Optional, alphanumeric, 7 positions

Type the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit.

Year

Optional, alphanumeric, 4 positions

Type the reconciliation year for the requested transmission record.

Quarter

Optional, alphanumeric, 1 position

Type the reconciliation quarter for the requested transmission record.

Order By

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the Carrier ID sort option. To choose a sort option, select the radio button next to one of the following values:

`Carrier ID`	Sorts search results by carrier ID.
`Year/Quarter`	Sorts search results by reconciliation year and reconciliation quarter.

Carrier Transmissions Search Results Page Field Descriptions

The Carrier Transmissions Search Results page (**Figure 2:47**) displays a list of carrier transmission records resulting from the search criteria entered on the Carrier Transmissions page (**Figure 2:46**). For instructions on using the Carrier Transmissions Search Results page, see **Viewing Carrier Transmission Records** in **Part 2**.

Carrier ID

No entry

This field is system generated. This is the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit.

Year

No entry

This field is system generated. This is the reconciliation year for the requested transmission record.

Quarter

No entry

This field is system generated. This is the reconciliation quarter for the requested transmission record.

Submission

No entry

This field is system generated. This is the number of transmissions submitted for the reconciliation quarter selected.

Submission Date

No entry

This field is system generated. This is the date the transmission was submitted.

Code

No entry

This field is system generated. This is the transmission processing code. The **`Initial`** code indicates an initial file, the **`Add`** code indicates an additional file, and the **`Replace`** code indicates a replacement file.

Status

No entry

This field is system generated. This field displays **`000`** for an accepted transmission; otherwise, a carrier system code is displayed. It indicates the status of a carrier enrollment data transmission. For a list and descriptions of carrier system codes, see **Carrier System Codes Table** in **Part 4**.

Validation

No entry

This field is system generated. This is the status of the validation. The `Validated` code is displayed when the transmission is validated. The `Cleared` code is displayed when the transmission validation is cleared.

Carrier Transmissions View Page Field Descriptions

The Carrier Transmissions View page (**Figure 2:48**) displays a selected carrier transmission record. For instructions on using the Carrier Transmissions View page, see **Viewing Carrier Transmission Records** in **Part 2**.

Carrier ID

No entry

This field is system generated. This is the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit.

Year

No entry

This field is system generated. This is the reconciliation year for the requested transmission record.

Quarter

No entry

This field is system generated. This is the reconciliation quarter for the requested transmission record.

Submission

No entry

This field is system generated. This is the number of transmissions submitted for the reconciliation quarter selected.

Submission Date

No entry

This field is system generated. This is the date the transmission was submitted.

As of Date

No entry

This field is system generated. This is the date the transmitted enrollment data was extracted.

Records Sent

No entry

This field is system generated. This is the number of records sent in the transmission.

Records Received

No entry

This field is system generated. This is the number of records found in the transmission file during processing.

Records Processed

No entry

This field is system generated. This is the number of records accepted to store in the CLER tables.

Date Processed

No entry

This field is system generated. This is the current system date when the process was run.

Time Processed

No entry

This field is system generated. This is the current system time when the process was run.

Code

No entry

This field is system generated. This is the transmission processing code. The code **I** or blank indicate an initial file, code **A** indicates additional, and code **R** indicates replace all previous.

Status

No entry

This field is system generated. This field displays **000** for an accepted transmission; otherwise, a carrier system code is displayed. It indicates the status of a carrier enrollment data transmission. For a list and descriptions of carrier system codes, see **Carrier System Codes Table** in **Part 4**.

Source

No entry

This field is system generated. This is the source of transmission data indicator. The value in the first position equals **M** for mainframe or **S** for server. The value in the second position equals **T** for transmission or **M** for manual entry.

Email Date

No entry

This field is system generated. This is the date the last e-mail was sent to this submitter as a reminder to send a transmission for the current reconciliation quarter.

Email Time

No entry

This field is system generated. This is the time the last e-mail was sent to this submitter as a reminder to send a transmission for the current reconciliation quarter.

►Carrier Enrollees Page Field Instructions

The Carrier Enrollees page (**Figure 2:49**) is used to search for carrier enrollee records by carrier ID, year, etc. For instructions on using the Carrier Enrollees page, see **Maintaining Carrier Enrollee Records Marked With Discrepancy Code 160** in **Part 2**.

Note: Entry of at least two optional fields (e.g., Payroll Office, Enrollment Code, etc.) is required for the search, unless you complete the **entire** SSN field, in which case, no other entries are needed.

Carrier ID

Required

Click the drop-down menu and select the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit.

Year

Optional default

Click the drop-down menu and select the reconciliation year. If no year is selected, this field automatically defaults to the current reconciliation year.

Quarter

Optional default

Click the drop-down menu and select the reconciliation quarter. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

Payroll Office

Optional, alphanumeric, 8 positions

Type your organization's payroll office identification number. Only the payroll office identification number for your organization should be typed in this field. If this number is not typed, this field automatically defaults to your organization's payroll office identification number.

Enrollment Code

Optional, alphanumeric, 3 positions

Type the carrier enrollment code.

SSN

To search for a specific enrollee record by social security number (SSN), or to search for a range of enrollee records by a range of SSNs, complete the fields as described below.

Note: A search for enrollee records by **complete** enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Payroll Office, Enrollment Code, etc.) on this page.

From

Optional, numeric, 9 positions max.

To search for a specific enrollee record by SSN, type the SSN and skip the To field.

To search for a range of enrollee records by a range of SSNs, type the SSN that starts the range, then go to the To field.

To

Optional, numeric, 9 positions max.

When searching for a range of enrollee records by a range of SSNs, type the SSN that ends the range; otherwise, leave blank.

Last Name

Optional, alphanumeric, 25 positions max.

Type the enrollee's last name. If the enrollee has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III). If there is a case of an enrollee having only one name, that one name must be entered in this field.

First Name

Optional, alphanumeric, 12 positions max.

Type the enrollee's first name. This must be provided with the exception of when an enrollee has only one name.

Middle Name

Optional, alphanumeric, 12 positions max.

Type the enrollee's middle name.

Display

Optional default

This field allows users to display search results by the options listed below. If no display option is selected, this field automatically defaults to the All Records display option. To choose a display option, select the radio button next to one of the following values:

All Records	Displays all records related to the search criteria.
Matches	Displays all matched records related to the search criteria.
No Matches	Displays all unmatched records related to the search criteria.
Discrepancies	Displays all records with discrepancies related to the search criteria.
Warnings	Displays all records with warnings related to the search criteria.
Unreconciled	Displays all records with unreconciled discrepancies related to the search criteria.
Reconciled	Displays all records with reconciled discrepancies related to the search criteria.
Confirmed	Displays all records with confirmed discrepancies related to the search criteria. Confirmed discrepancies are discrepancies where the carrier is in agreement with the payroll office's reconciliation reason and reconciliation action.
Disputed	Displays all records with disputed discrepancies related to the search criteria. Disputed discrepancies are discrepancies where the carrier is not in agreement with the payroll office's reconciliation reason and reconciliation action.
Not Validated	Displays all records that have not been validated.

Order By

1st

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the Name sort option. To choose a sort option, click the drop-down menu and select one of the following options to display the selected criteria in first sort search order:

Payroll Office	Sorts search results by payroll office identification number.
Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
SSNO	Sorts search results by enrollee social security number.

2nd

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the SSNO sort option. To choose a sort option, click the drop-down menu and select one of the following options to display the selected criteria in second sort search order:

Payroll Office	Sorts search results by payroll office identification number.
Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
SSNO	Sorts search results by enrollee social security number.

3rd

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in third sort search order:

Payroll Office	Sorts search results by payroll office identification number.
Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
SSNO	Sorts search results by enrollee social security number.

4th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in fourth sort search order:

Payroll Office	Sorts search results by payroll office identification number.
Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
SSNO	Sorts search results by enrollee social security number.

5th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in fifth sort search order:

`Payroll Office`	Sorts search results by payroll office identification number.
`Enrollment Code`	Sorts search results by enrollment code.
`Fail Count`	Sorts search results by the number of times a record has failed the quarterly edit process.
`Name`	Sorts search results by enrollee name.
`SSNO`	Sorts search results by enrollee social security number.

Carrier Enrollees Search Results Page Field Descriptions

The Carrier Enrollees Search Results page (**Figure 2:50**) displays a list of carrier enrollee records resulting from the search criteria entered on the Carrier Enrollees page (**Figure 2:49**). Only carrier enrollee records marked with **Discrepancy Code 160** are displayed. For instructions on using the Carrier Enrollees Search Results page, see **Maintaining Carrier Enrollee Records Marked With Discrepancy Code 160** in **Part 2**.

Carrier ID

No entry

This field is system generated. This is the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit.

Year

No entry

This field is system generated. This is the reconciliation year.

Quarter

No entry

This field is system generated. This is the reconciliation quarter.

Enrollee SSN

No entry

This field is system generated. This is the enrollee's social security number.

Last Name

No entry

This field is system generated. This is the enrollee's last name.

First Name

No entry

This field is system generated. This is the enrollee's first name.

Payroll Office

No entry

This field is system generated. This is the payroll office identification number.

Code

No entry

This field is system generated. This is the enrollment code.

Discrepancies

No entry

This field is system generated. **Discrepancy Code 160** is displayed. For a detailed explanation of **Discrepancy Code 160**, see **Discrepancy Codes Table** in **Part 4**.

Note: Check marks are displayed next to discrepancy codes that have been addressed by agencies and carriers. Red check marks are displayed next to discrepancies that have been addressed by agencies. Green check marks are displayed next to discrepancies that have been addressed by carriers. To display the most current check marks, click **[Refresh]** at the top of the Carrier Enrollees Search Results page.

Fail Count

No entry

This field is system generated. This is the number of times this record has failed the quarterly edit process.

Carrier Enrollees View Page Field Descriptions

The Carrier Enrollees View page (**Figure 2:51**) displays a carrier enrollee record that is marked with **Discrepancy Code 160**. For instructions on using the Carrier Enrollees View page, see **Viewing A Carrier Enrollee Record Marked With Discrepancy Code 160**.

Note: If this page is displayed by clicking the **[Matching]** button on the Payroll Office Enrollees View page (**Figure 2:25**), the information displayed is limited to the payroll office identification number, carrier identifier, enrollment effective date, and the year and quarter the carrier enrollee record was submitted. For instructions on using the Carrier Enrollees View page in this instance, see CNTL.

Carrier ID

No entry

This field is system generated. This is the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit.

Year

No entry

This field is system generated. This is the reconciliation year.

Quarter

No entry

This field is system generated. This is the reconciliation quarter.

Submission

No entry

This field is system generated. This is the transmission submission for this enrollee record.

Payroll Office ID

No entry

This field is system generated. This is the payroll office identification number.

Enrollment Code

No entry

This field is system generated. This is the enrollment code.

SSN

No entry

This field is system generated. This is the enrollee's social security number.

Last Name

No entry

This field is system generated. This is the enrollee's last name.

First Name

No entry

This field is system generated. This is the enrollee's first name.

Middle Name

No entry

This field is system generated. This is the enrollee's middle name.

Effective Date

No entry

This field is system generated. This is the effective date of the enrollment.

Deceased Annuitant SSN

No entry

This field is system generated. This is the deceased annuitant enrollee's social security number.

Pseudo SSN

No entry

This field is system generated. This is the pseudo social security number used by the agency and carrier to identify the enrollee.

Other Payroll ID

No entry

This field is system generated. This is an identifier used by the agency to identify the enrollee.

Other Carrier ID

No entry

This field is system generated. This is an identifier used by the carrier to identify the enrollee.

Submitter Use #1

No entry

This field is system generated. These are remarks that were entered by the organization that created the enrollment record.

Submitter Use #2

No entry

This field is system generated. These are remarks that were entered by the organization that created the enrollment record.

Submitter Use #3

No entry

This field is system generated. These are remarks that were entered by the organization that created the enrollment record.

Date Processed

No entry

This field is system generated. This is the date the record was processed.

Time Processed

No entry

This field is system generated. This is the time the record was processed.

Source

No entry

This field is system generated. This is the source of transmission data indicator. The value in the first position equals **M** for mainframe or **S** for server. The value in the second position equals **T** for transmission or **M** for manual entry.

Fail Count

No entry

This field is system generated. This is the number of times this record has failed the quarterly edit process.

Select another discrepancy

Optional

If multiple discrepancies are shown, click each discrepancy number to view the corresponding code and message.

Discrepancy

No entry

This field is system generated. **Discrepancy Code 160** is displayed. A short description is displayed next to the code. To view a detailed explanation of this code, click **[Explain]** or see **Discrepancy Codes Table** in **Part 4**.

Reconciliation Reason

No entry

This field is system generated. This code identifies the cause of the discrepancy as reported by the agency. A short description is displayed next to the code. To view a detailed explanation of this code, click **[Explain]** or see **Reconciliation Reason Codes Table** in **Part 4**.

Reconciliation Action

No entry

This field is system generated. This code identifies the action requested by the agency to resolve the discrepancy. A short description is displayed next to the code. To view a detailed explanation of this code, click **[Explain]** or see **Reconciliation Action Codes Table** in **Part 4**.

Corrective Action

No entry

This field is system generated. This code identifies the carrier's response to the reconciliation action code displayed in the Reconciliation Action field. A short description is displayed next to the code. To view a detailed explanation of this code, click **[Explain]** or see **Carrier Corrective Action Response Codes Table** in **Part 4**.

Payroll Office Comments

No entry

This field is system generated. These are the payroll office's comments.

Carrier Comments

No entry

This field is system generated. These are the carrier's comments.

Last Payroll Update

ID

No entry

This field is system generated. This is the user identification number of the payroll office representative who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change.

Time

No entry

This field is system generated. This is the time of the most recent change.

Last Carrier Update

ID

No entry

This field is system generated. This is the user identification number of the carrier representative who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change.

Time

No entry

This field is system generated. This is the time of the most recent change.

Payroll Office Enrollees Validate Page Field Instructions

The Payroll Office Enrollees Validate page (**Figure 2:52**) is used to validate a carrier enrollee record that is marked with **Discrepancy Code 160**. For instructions on using the Payroll Office Enrollees Validate page, see **Validating A Carrier Enrollee Record Marked With Discrepancy Code 160**.

Carrier ID

No entry

This field is system generated. This is the carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit.

Year

No entry

This field is system generated. This is the reconciliation year.

Quarter

No entry

This field is system generated. This is the reconciliation quarter.

Submission

No entry

This field is system generated. This is the transmission submission for this enrollee record.

Payroll Office ID

No entry

This field is system generated. This is the payroll office identification number.

Enrollment Code

No entry

This field is system generated. This is the enrollee's enrollment code.

SSN

No entry

This field is system generated. This is the enrollee's social security number.

Last Name

No entry

This field is system generated. This is the enrollee's last name.

First Name

No entry

This field is system generated. This is the enrollee's first name.

Middle Name

No entry

This field is system generated. This is the enrollee's middle name.

Effective Date

No entry

This field is system generated. This is the effective date of the enrollment.

Deceased Annuitant SSN

No entry

This field is system generated. This is the deceased annuitant enrollee's social security number.

Pseudo SSN

No entry

This field is system generated. This is the pseudo social security number used by the agency and carrier to identify the enrollee.

Other Payroll ID

No entry

This field is system generated. This is an identifier used by the agency to identify the enrollee.

Other Carrier ID

No entry

This field is system generated. This is an identifier used by the carrier to identify the enrollee.

Submitter Use #1

No entry

This field is system generated. These are remarks that were entered by the organization that created the enrollment record.

Submitter Use #2

No entry

This field is system generated. These are remarks that were entered by the organization that created the enrollment record.

Submitter Use #3

No entry

This field is system generated. These are remarks that were entered by the organization that created the enrollment record.

Date Processed

No entry

This field is system generated. This is the date the record was processed.

Time Processed

No entry

This field is system generated. This is the time the record was processed.

Source

No entry

This field is system generated. This is the source of transmission data indicator. The value in the first position equals **M** for mainframe or **S** for server. The value in the second position equals **T** for transmission or **M** for manual entry.

Fail Count

No entry

This field is system generated. This is the number of times this record has failed the quarterly edit process.

Select another discrepancy

Optional

If multiple discrepancies are shown, click each discrepancy number to view the corresponding code and message.

Discrepancy

No entry

This field is system generated. **Discrepancy Code 160** is displayed. A short description is displayed next to the code. To view a detailed explanation of **Discrepancy Code 160**, click **[Explain]** or see **Discrepancy Codes Table** in **Part 4**.

Reconciliation Reason

Required

Click the drop-down menu and select the code that identifies the cause of the discrepancy. A short description is displayed next to the code. To view a detailed explanation of the reconciliation reason code, click **[Explain]** or see **Reconciliation Reason Codes Table** in **Part 4**.

Reconciliation Action

Required

Click the drop-down menu and select the code that identifies the action requested to resolve the discrepancy. A short description is displayed next to the code. To view a detailed explanation of the reconciliation action code, click **[Explain]** or see **Reconciliation Action Codes Table** in **Part 4**.

Corrective Action

No entry

This field is system generated. This code identifies the carrier's response to the reconciliation action code displayed in the Reconciliation Action field. A short description is displayed next to the code. To view a detailed explanation of a carrier corrective action response code, see **Carrier Corrective Action Response Codes Table** in **Part 4**. If the enrollee record is validated, the **[Explain]** is displayed. Click **[Explain]** to display a detailed explanation of the code.

Payroll Office Comments

Conditional, alphanumeric, 400 positions max.

Type comments about this record.

Note: If **580** was selected in the Reconciliation Reason field, comments explaining the reconciliation reason must be entered in this field.

Carrier Comments

No entry

This field is system generated. These are the carrier's comments about this record.

Last Payroll Update

ID

No entry

This field is system generated. This is the user identification number of the payroll office representative who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change made to the record by the payroll office.

Time

No entry

This field is system generated. This is the time of the most recent change made to the record by the payroll office.

Last Carrier Update

ID

No entry

This field is system generated. This is the user identification number of the carrier representative who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change made to the record by the carrier.

Time

No entry

This field is system generated. This is the time of the most recent change made to the record by the carrier.

Forms Field Descriptions And Instructions

This section presents the following topics:

Form 2809 Page Field Instructions

The Form 2809 page (**Figure 2:54**) is used to search for Form 2809 records by payroll office ID, year, etc. For instructions on using the Form 2809 page, see **Maintaining 2809 Records** in **Part 2**.

Payroll Office ID

Required

Click the drop-down menu and select the payroll office identification number.

Year

Optional default

Click the drop-down menu and select the reconciliation year. If no year is selected, this field automatically defaults to the current reconciliation year.

Quarter

Optional default

Click the drop-down menu and select the reconciliation quarter. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

Agency ID

Optional, alphanumeric, 4 positions

Type the agency identification code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

POI

Optional, alphanumeric, 4 positions

Type the personnel office identifier of the office where the enrollee's records are maintained.

Enrollment Code

Optional, alphanumeric, 3 positions

Type the enrollment code.

SSN

Optional, alphanumeric, 9 positions

►Type the enrollee's social security number (SSN) or pseudo SSN.◄

User ID

Optional, alphanumeric, 8 positions max.

Type the user identification number of the person creating the form.

Last Name

Optional, alphanumeric, 25 positions max.

Type the enrollee's last name. If the enrollee has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

First Name

Optional, alphanumeric, 17 positions max.

Type the enrollee's first name.

Initial

Optional, alphanumeric, 1 position

Type the enrollee's middle initial.

Display

Optional default

This field allows users to display search results by the options listed below. If no display option is selected, this field automatically defaults to the All option. To choose a display option, select the radio button next to one of the following values:

All	Displays all records related to the search criteria.
Released	Displays records released for processing.

`Cancelled`	Displays records that have been cancelled.
`Not Released`	Displays records not released for processing.
`Processed`	Displays processed records.

Order By

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the Agency ID sort option. To choose a sort option, select the radio button next to one of the following values:

`Agency ID`	Sorts search results by agency identification code.
`SSN`	Sorts search results by enrollee social security number.
`Name`	Sorts search results by enrollee name.
`User ID`	Sorts search results by user identification number.
`Status`	Sorts search results by status (i.e., released, processed, not released, or cancelled release).

Form 2809 Add (Part A) Page Field Instructions

The Form 2809 Add (Part A) page (**Figure 2:55**) is used to create a Form 2809 (Part A) record to correct carrier enrollee records and resolve identified discrepancies. For instructions on using the Form 2809 Add (Part A) page, see **Adding A 2809 Record** in **Part 2**.

Payroll Office ID

Required

Click the drop-down menu and select the payroll office identification number for the 2809 record for being created.

Year

Optional default

Click the drop-down menu and select the reconciliation year for the 2809 record being created. If no year is selected, this field automatically defaults to the current reconciliation year.

Quarter

Optional default

Click the drop-down menu and select the reconciliation quarter for the 2809 record being created. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

Personnel Office ID

Conditional, alphanumeric, 4 positions

If access is limited to a specific personnel office identifier code, type that code.

►**Note:** Although the system allows for a blank field, please complete this field if the condition applies.◄

Nature of Action

You **must** select one of the following Nature of Action codes:

CLER Field Descriptions And Instructions

Start

Conditional

To start the enrollment, click the radio button.

Change

Conditional

To change the enrollment, click the radio button.

Suspend

Conditional

To suspend the enrollment, click the radio button.

Stop

Conditional

To stop the enrollment, click the radio button.

Last Name

Required, alphanumeric, 25 positions max.

Type the enrollee’s last name. If the enrollee has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

First Name

Required, alphanumeric, 17 positions max.

Type the enrollee’s first name.

Initial

Optional, alphanumeric, 1 position

Type the enrollee’s middle initial.

Note: Although the system allows for a blank field, please complete this field if the data is available.

Address Line 1

Conditional, alphanumeric, 35 positions max.

Type the first line of the enrollee’s domestic or foreign street, apartment number, PO box, rural route, etc., if applicable.

Note: Although the system allows for a blank field, please complete this field if the condition applies.

Address Line 2

Conditional, alphanumeric, 35 positions max.

Type the second line of the enrollee’s domestic or foreign street, apartment number, PO box, rural route, etc., if applicable.

Note: Although the system allows for a blank field, please complete this field if the condition applies.

Address Line 3

Conditional, alphanumeric, 35 positions max.

Type the third line of the enrollee’s domestic or foreign street, apartment number, PO box, rural route, etc., if applicable.

Note: Although the system allows for a blank field, please complete this field if the condition applies.

City

Required, alphanumeric, 23 positions max.

Type the name of the enrollee's domestic or foreign city.

Note: If the address is an overseas military address, type FPO for fleet post office or APO for army post office in lieu of the city.

State

Conditional

Click the drop-down menu and select the enrollee's state, U.S. territory, or overseas military abbreviation. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory, And Overseas Military Abbreviations Table** in **Part 4**.

Note: If the address contains a state, U.S. territory, or overseas military abbreviation, this field is required; otherwise, do not complete this field.

ZIP

Conditional, alphanumeric, 11 positions max.

Type the enrollee's domestic ZIP Code or foreign postal code.

Note: If the State field is completed, a ZIP code must be entered. If the State field is not completed, this field is optional.

Country

Conditional

Click the drop-down menu and select the enrollee's country code. For a list and descriptions of country codes, see **Country Codes Table** in **Part 4**.

Note: If the State field is completed, do not complete this field. If the State field is not completed, and the address is from a country other than the United States, a country code must be entered.

SSN

Required, alphanumeric, 9 positions

►Type the enrollee's social security number (SSN). If the enrollee does not want his/her SSN provided to the carrier, a pseudo SSN may be used if the pseudo SSN is also reported to CLER.◄

Date of Birth

Required, alphanumeric, 8 positions

Type the enrollee's date of birth (MMDDYYYY).

Sex

Required

Select the radio button next to one of the following values:

M	Indicates the enrollee is male.
F	Indicates the enrollee is female.

Married

Required

Select the radio button next one of the following values:

Y	Indicates the enrollee is married.
N	Indicates the enrollee is single.

Phone

Optional, ▶numeric◀, 7 positions max.

Type the enrollee's daytime area code and telephone number. ▶**Do not** type alpha characters, spaces, dashes, parentheses, periods, etc.◀

Form 2809 Add (Part B) Page Field Instructions

The Form 2809 Add (Part B) page (**Figure 2:56**) is used to create a Form 2809 (Part B) record to correct carrier enrollee records and resolve identified discrepancies. For instructions on using the Form 2809 Add (Part B) page, see **Adding A 2809 Record** in **Part 2**.

Plan Name

Conditional, alphanumeric, 35 positions max.

Type the name of the FEHB health insurance plan in which the individual is enrolling. If the Nature of Action field in Part A is **`Start`** or **`Change`**, this field is required. If the Nature of Action in Part A is **`Stop`** or **`Suspend`**, do not complete this field.

Enrollment Code

Conditional, alphanumeric, 3 positions

Type the enrollment code, which consists of the plan and option codes. If the Nature of Action in Part A is **`Start`** or **`Change`**, this field is required. If the Nature of Action in Part A is **`Stop`** or **`Suspend`**, do not complete this field.

Last Name Line 1

Conditional, alphanumeric, 25 positions max.

▶If the Enrollment Code indicates coverage is for Self and Family, type the last name of the enrollee's first family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field. If the enrollee's family member has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).◀

First Name Line 1

Conditional, alphanumeric, 17 positions max.

▶If the Last Name Line 1 field is completed, type the first name of the enrollee's first family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.◀

Initial Line 1

Conditional, alphanumeric, 1 position

▶If the Last Name Line 1 field is completed, type the middle initial of the enrollee's first family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◀

Date of Birth Line 1

Conditional, alphanumeric, 8 positions

▶If the Last Name Line 1 field is completed, type the date of birth (MMDDYYYY) of the enrollee's first family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.◀

Code Line 1

Conditional

▶If the Last Name Line 1 field is completed, click the drop-down menu and select the code used to identify the first family member's relation to the enrollee; otherwise, do not complete this field.◀The following are relationship codes: 1 for Spouse; 2 for Unmarried dependent child under age 22 (including an adopted child); 3 for Stepchild, foster child, or recognized natural child; 4 for Unmarried disabled child over age 22 incapable of self-support; and 5 for Parent of dependent survivor annuitant.

▶**Note:** Code 5 is displayed only when **`24900002`** or **`24900003`** is entered in the Payroll Office ID field on the Form 2809 (Part A) page.◀

SSN Line 1

▶*Conditional*◀*, alphanumeric, 9 positions*

▶If the Last Name Line 1 field is completed, type the SSN of the enrollee's first family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field. If the enrollee's family member does not want his/her SSN provided to the carrier, a pseudo SSN may be used.◀

Sex Line 1

Conditional

▶If the Last Name Line 1 field is completed, select the radio button next to one of the values listed below; otherwise, do not complete this field.◀

`M`	Indicates the enrollee's first family member is male.
`F`	Indicates the enrollee's first family member is female.

ZIP Line 1

▶*Conditional*◀*, alphanumeric, 11 positions max.*

▶If the Last Name Line 1 field is completed, type the domestic ZIP Code or foreign postal code of the enrollee's first family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◀

Last Name Line 2

Conditional, alphanumeric, 25 positions max.

▶If the Enrollment Code indicates coverage is for Self and Family, type the last name of the enrollee's second family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field. If the enrollee's family member has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).◀

First Name Line 2

Conditional, alphanumeric, 17 positions max.

▶If the Last Name Line 2 field is completed, type the first name of the enrollee's second family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.◀

CLER Field Descriptions And Instructions

Initial Line 2

Conditional, alphanumeric, 1 position

►If the Last Name Line 2 field is completed, type the middle initial of the enrollee's second family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◄

Date of Birth Line 2

Conditional, alphanumeric, 8 positions

►If the Last Name Line 2 field is completed, type the date of birth (MMDDYYYY) of the enrollee's second family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.◄

Code Line 2

Conditional

►If the Last Name Line 2 field is completed, click the drop-down menu and select the code used to identify the second family member's relation to the enrollee; otherwise, do not complete this field.◄The following are relationship codes: 1 for Spouse; 2 for Unmarried dependent child under age 22 (including an adopted child); 3 for Stepchild, foster child, or recognized natural child; 4 for Unmarried disabled child over age 22 incapable of self-support; and 5 for Parent of dependent survivor annuitant.

►**Note:** Code 5 is displayed only when **`24900002`** or **`24900003`** is entered in the Payroll Office ID field on the Form 2809 (Part A) page.◄

SSN Line 2

►*Conditional*◄*, alphanumeric, 9 positions*

►If the Last Name Line 2 field is completed, type the SSN of the enrollee's second family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field. If the enrollee's family member does not want his/her SSN provided to the carrier, a pseudo SSN may be used.◄

Sex Line 2

Conditional

►If the Last Name Line 2 field is completed, select the radio button next to one of the values listed below; otherwise, do not complete this field.◄

`M`	Indicates the enrollee's second family member is male.
`F`	Indicates the enrollee's second family member is female.

ZIP Line 2

►*Conditional*◄*, alphanumeric, 11 positions max.*

►If the Last Name Line 2 field is completed, type the domestic ZIP Code or foreign postal code of the enrollee's second family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◄

Last Name Line 3

Conditional, alphanumeric, 25 positions max.

►If the Enrollment Code indicates coverage is for Self and Family, type the last name of the enrollee's third family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field. If the enrollee's family member has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).◄

First Name Line 3

Conditional, alphanumeric, 17 positions max.

►If the Last Name Line 3 field is completed, type the first name of the enrollee's third family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.◄

Initial Line 3

Conditional, alphanumeric, 1 position

►If the Last Name Line 3 field is completed, type the middle initial of the enrollee's third family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◄

Date of Birth Line 3

Conditional, alphanumeric, 8 positions

►If the Last Name Line 3 field is completed, type the date of birth (MMDDYYYY) of the enrollee's third family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.◄

Code Line 3

Conditional

►If the Last Name Line 3 field is completed, click the drop-down menu and select the code used to identify the third family member's relation to the enrollee; otherwise, do not complete this field.◄The following are relationship codes: 1 for Spouse; 2 for Unmarried dependent child under age 22 (including an adopted child); 3 for Stepchild, foster child, or recognized natural child; 4 for Unmarried disabled child over age 22 incapable of self-support; and 5 for Parent of dependent survivor annuitant.

►**Note:** Code 5 is displayed only when `24900002` or `24900003` is entered in the Payroll Office ID field on the Form 2809 (Part A) page.◄

SSN Line 3

►*Conditional*◄*, alphanumeric, 9 positions*

►If the Last Name Line 3 field is completed, type the SSN of the enrollee's third family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field. If the enrollee's family member does not want his/her SSN provided to the carrier, a pseudo SSN may be used.◄

Sex Line 3

Conditional

►If the Last Name Line 3 field is completed, select the radio button next to one of the values listed below; otherwise, do not complete this field.◄

`M`	Indicates the enrollee's third family member is male.
`F`	Indicates the enrollee's third family member is female.

CLER Field Descriptions And Instructions

ZIP Line 3

Conditional, alphanumeric, 11 positions max.

If the Last Name Line 3 field is completed, type the domestic ZIP Code or foreign postal code of the enrollee's third family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.

Last Name Line 4

Conditional, alphanumeric, 25 positions max.

If the Enrollment Code indicates coverage is for Self and Family, type the last name of the enrollee's fourth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field. If the enrollee's family member has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

First Name Line 4

Conditional, alphanumeric, 17 positions max.

If the Last Name Line 4 field is completed, type the first name of the enrollee's fourth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Initial Line 4

Conditional, alphanumeric, 1 position

If the Last Name Line 4 field is completed, type the middle initial of the enrollee's fourth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.

Date of Birth Line 4

Conditional, alphanumeric, 8 positions

If the Last Name Line 4 field is completed, type the date of birth (MMDDYYYY) of the enrollee's fourth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Code Line 4

Conditional

If the Last Name Line 4 field is completed, click the drop-down menu and select the code used to identify the fourth family member's relation to the enrollee; otherwise, do not complete this field. The following are relationship codes: 1 for Spouse; 2 for Unmarried dependent child under age 22 (including an adopted child); 3 for Stepchild, foster child, or recognized natural child; 4 for Unmarried disabled child over age 22 incapable of self-support; and 5 for Parent of dependent survivor annuitant.

Note: Code 5 is displayed only when **24900002** or **24900003** is entered in the Payroll Office ID field on the Form 2809 (Part A) page.

SSN Line 4

Conditional, alphanumeric, 9 positions

If the Last Name Line 4 field is completed, type the SSN of the enrollee's fourth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field. If the enrollee's family member does not want his/her SSN provided to the carrier, a pseudo SSN may be used.

Sex Line 4

Conditional

►If the Last Name Line 4 field is completed, select the radio button next to one of the values listed below; otherwise, do not complete this field.◄

M	Indicates the enrollee's fourth family member is male.
F	Indicates the enrollee's fourth family member is female.

ZIP Line 4

►Conditional◄, alphanumeric, 11 positions max.

►If the Last Name Line 4 field is completed, type the domestic ZIP Code or foreign postal code of the enrollee's fourth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◄

Last Name Line 5

Conditional, alphanumeric, 25 positions max.

►If the Enrollment Code indicates coverage is for Self and Family, type the last name of the enrollee's fifth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field. If the enrollee's family member has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).◄

First Name Line 5

Conditional, alphanumeric, 17 positions max.

►If the Last Name Line 5 field is completed, type the first name of the enrollee's fifth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.◄

Initial Line 5

Conditional, alphanumeric, 1 position

►If the Last Name Line 5 field is completed, type the middle initial of the enrollee's fifth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◄

Date of Birth Line 5

Conditional, alphanumeric, 8 positions

►If the Last Name Line 5 field is completed, type the date of birth (MMDDYYYY) of the enrollee's fifth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.◄

Code Line 5

Conditional

If the Last Name Line 5 field is completed, click the drop-down menu and select the code used to identify the fifth family member's relation to the enrollee; otherwise, do not complete this field. The following are relationship codes: 1 for Spouse; 2 for Unmarried dependent child under age 22 (including an adopted child); 3 for Stepchild, foster child, or recognized natural child; 4 for Unmarried disabled child over age 22 incapable of self-support; and 5 for Parent of dependent survivor annuitant.

Note: Code 5 is displayed only when `24900002` or `24900003` is entered in the Payroll Office ID field on the Form 2809 (Part A) page.

SSN Line 5

Conditional, alphanumeric, 9 positions

If the Last Name Line 5 field is completed, type the SSN of the enrollee's fifth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field. If the enrollee's family member does not want his/her SSN provided to the carrier, a pseudo SSN may be used.

Sex Line 5

Conditional

If the Last Name Line 5 field is completed, select the radio button next to one of the values listed below; otherwise, do not complete this field.

`M`	Indicates the enrollee's fifth family member is male.
`F`	Indicates the enrollee's fifth family member is female.

ZIP Line 5

Conditional, alphanumeric, 11 positions max.

If the Last Name Line 5 field is completed, type the domestic ZIP Code or foreign postal code of the enrollee's fifth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.

Last Name Line 6

Conditional, alphanumeric, 25 positions max.

If the Enrollment Code indicates coverage is for Self and Family, type the last name of the enrollee's sixth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field. If the enrollee's family member has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

First Name Line 6

Conditional, alphanumeric, 17 positions max.

If the Last Name Line 6 field is completed, type the first name of the enrollee's sixth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Initial Line 6

Conditional, alphanumeric, 1 position

▶If the Last Name Line 6 field is completed, type the middle initial of the enrollee's sixth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◀

Date of Birth Line 6

Conditional, alphanumeric, 8 positions

▶If the Last Name Line 6 field is completed, type the date of birth (MMDDYYYY) of the enrollee's sixth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.◀

Code Line 6

Conditional

▶If the Last Name Line 6 field is completed, click the drop-down menu and select the code used to identify the sixth family member's relation to the enrollee; otherwise, do not complete this field.◀The following are relationship codes: 1 for Spouse; 2 for Unmarried dependent child under age 22 (including an adopted child); 3 for Stepchild, foster child, or recognized natural child; 4 for Unmarried disabled child over age 22 incapable of self-support; and 5 for Parent of dependent survivor annuitant.

▶**Note:** Code 5 is displayed only when **`24900002`** or **`24900003`** is entered in the Payroll Office ID field on the Form 2809 (Part A) page.◀

SSN Line 6

▶*Conditional*◀*, alphanumeric, 9 positions*

▶If the Last Name Line 6 field is completed, type the SSN of the enrollee's sixth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field. If the enrollee's family member does not want his/her SSN provided to the carrier, a pseudo SSN may be used.◀

Sex Line 6

Conditional

▶If the Last Name Line 6 field is completed, select the radio button next to one of the values listed below; otherwise, do not complete this field.◀

M	Indicates the enrollee's sixth family member is male.
F	Indicates the enrollee's sixth family member is female.

ZIP Line 6

▶*Conditional*◀*, alphanumeric, 11 positions max*

▶If the Last Name Line 6 field is completed, type the domestic ZIP Code or foreign postal code of the enrollee's sixth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◀

CLER Field Descriptions And Instructions

Last Name Line 7

Conditional, alphanumeric, 25 positions max.

▶If the Enrollment Code indicates coverage is for Self and Family, type the last name of the enrollee's seventh family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field. If the enrollee's family member has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).◀

First Name Line 7

Conditional, alphanumeric, 17 positions max.

▶If the Last Name Line 7 field is completed, type the first name of the enrollee's seventh family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.◀

Initial Line 7

Conditional, alphanumeric, 1 position

▶If the Last Name Line 7 field is completed, type the middle initial of the enrollee's seventh family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◀

Date of Birth Line 7

Conditional, alphanumeric, 8 positions

▶If the Last Name Line 7 field is completed, type the date of birth (MMDDYYYY) of the enrollee's seventh family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.◀

Code Line 7

Conditional

▶If the Last Name Line 7 field is completed, click the drop-down menu and select the code used to identify the seventh family member's relation to the enrollee; otherwise, do not complete this field.◀The following are relationship codes: 1 for Spouse; 2 for Unmarried dependent child under age 22 (including an adopted child); 3 for Stepchild, foster child, or recognized natural child; 4 for Unmarried disabled child over age 22 incapable of self-support; and 5 for Parent of dependent survivor annuitant.

▶**Note:** Code 5 is displayed only when **`24900002`** or **`24900003`** is entered in the Payroll Office ID field on the Form 2809 (Part A) page.◀

SSN Line 7

▶*Conditional*◀*, alphanumeric, 9 positions*

▶If the Last Name Line 7 field is completed, type the SSN of the enrollee's seventh family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field. If the enrollee's family member does not want his/her SSN provided to the carrier, a pseudo SSN may be used.◀

Sex Line 7

Conditional

▶If the Last Name Line 7 field is completed, select the radio button next to one of the values listed below; otherwise, do not complete this field.◀

`M` Indicates the enrollee's seventh family member is male.

`F` Indicates the enrollee's seventh family member is female.

ZIP Line 7

Conditional, alphanumeric, 11 positions max.

If the Last Name Line 7 field is completed, type the domestic ZIP Code or foreign postal code of the enrollee's seventh family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.

Last Name Line 8

Conditional, alphanumeric, 25 positions max.

If the Enrollment Code indicates coverage is for Self and Family, type the last name of the enrollee's eighth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field. If the enrollee's family member has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

First Name Line 8

Conditional, alphanumeric, 17 positions max.

If the Last Name Line 8 field is completed, type the first name of the enrollee's eighth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Initial Line 8

Conditional, alphanumeric, 1 position

If the Last Name Line 8 field is completed, type the middle initial of the enrollee's eighth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.

Date of Birth Line 8

Conditional, alphanumeric, 8 positions

If the Last Name Line 8 field is completed, type the date of birth (MMDDYYYY) of the enrollee's eighth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Code Line 8

Conditional

If the Last Name Line 8 field is completed, click the drop-down menu and select the code used to identify the eighth family member's relation to the enrollee; otherwise, do not complete this field. The following are relationship codes: 1 for Spouse; 2 for Unmarried dependent child under age 22 (including an adopted child); 3 for Stepchild, foster child, or recognized natural child; 4 for Unmarried disabled child over age 22 incapable of self-support; and 5 for Parent of dependent survivor annuitant.

Note: Code 5 is displayed only when **`24900002`** or **`24900003`** is entered in the Payroll Office ID field on the Form 2809 (Part A) page.

SSN Line 8

Conditional, alphanumeric, 9 positions

If the Last Name Line 8 field is completed, type the SSN of the enrollee's eighth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field. If the enrollee's family member does not want his/her SSN provided to the carrier, a pseudo SSN may be used.

CLER Field Descriptions And Instructions

Sex Line 8

Conditional

►If the Last Name Line 8 field is completed, select the radio button next to one of the values listed below; otherwise, do not complete this field.◄

M Indicates the enrollee's eighth family member is male.

F Indicates the enrollee's eighth family member is female.

ZIP Line 8

►Conditional◄, alphanumeric, 11 positions max.

►If the Last Name Line 8 field is completed, type the domestic ZIP Code or foreign postal code of the enrollee's eighth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◄

Last Name Line 9

Conditional, alphanumeric, 25 positions max.

►If the Enrollment Code indicates coverage is for Self and Family, type the last name of the enrollee's ninth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field. If the enrollee's family member has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).◄

First Name Line 9

Conditional, alphanumeric, 17 positions max.

►If the Last Name Line 9 field is completed, type the first name of the enrollee's ninth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.◄

Initial Line 9

Conditional, alphanumeric, 1 position

►If the Last Name Line 9 field is completed, type the middle initial of the enrollee's ninth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◄

Date of Birth Line 9

Conditional, alphanumeric, 8 positions

►If the Last Name Line 9 field is completed, type the date of birth (MMDDYYYY) of the enrollee's ninth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.◄

Code Line 9

Conditional

If the Last Name Line 9 field is completed, click the drop-down menu and select the code used to identify the ninth family member's relation to the enrollee; otherwise, do not complete this field. The following are relationship codes: 1 for Spouse; 2 for Unmarried dependent child under age 22 (including an adopted child); 3 for Stepchild, foster child, or recognized natural child; 4 for Unmarried disabled child over age 22 incapable of self-support; and 5 for Parent of dependent survivor annuitant.

Note: Code 5 is displayed only when `24900002` or `24900003` is entered in the Payroll Office ID field on the Form 2809 (Part A) page.

SSN Line 9

Conditional, alphanumeric, 9 positions

If the Last Name Line 9 field is completed, type the SSN of the enrollee's ninth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field. If the enrollee's family member does not want his/her SSN provided to the carrier, a pseudo SSN may be used.

Sex Line 9

Conditional

If the Last Name Line 9 field is completed, select the radio button next to one of the values listed below; otherwise, do not complete this field.

`M`	Indicates the enrollee's ninth family member is male.
`F`	Indicates the enrollee's ninth family member is female.

ZIP Line 9

Conditional, alphanumeric, 11 positions max.

If the Last Name Line 9 field is completed, type the domestic ZIP Code or foreign postal code of the enrollee's ninth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.

Last Name Line 10

Conditional, alphanumeric, 25 positions max.

If the Enrollment Code indicates coverage is for Self and Family, type the last name of the enrollee's tenth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field. If the enrollee's family member has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

First Name Line 10

Conditional, alphanumeric, 17 positions max.

If the Last Name Line 10 field is completed, type the first name of the enrollee's tenth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

CLER Field Descriptions And Instructions

Initial Line 10

Conditional, alphanumeric, 1 position

▶If the Last Name Line 10 field is completed, type the middle initial of the enrollee's tenth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◀

Date of Birth Line 10

Conditional, alphanumeric, 8 positions

▶If the Last Name Line 10 field is completed, type the date of birth (MMDDYYYY) of the enrollee's tenth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.◀

Code Line 10

Conditional

▶If the Last Name Line 10 field is completed, click the drop-down menu and select the code used to identify the tenth family member's relation to the enrollee; otherwise, do not complete this field.◀The following are relationship codes: 1 for Spouse; 2 for Unmarried dependent child under age 22 (including an adopted child); 3 for Stepchild, foster child, or recognized natural child; 4 for Unmarried disabled child over age 22 incapable of self-support; and 5 for Parent of dependent survivor annuitant.

▶**Note:** Code 5 is displayed only when **`24900002`** or **`24900003`** is entered in the Payroll Office ID field on the Form 2809 (Part A) page.◀

SSN Line 10

▶*Conditional*◀*, alphanumeric, 9 positions*

▶If the Last Name Line 10 field is completed, type the SSN of the enrollee's tenth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field. If the enrollee's family member does not want his/her SSN provided to the carrier, a pseudo SSN may be used.◀

Sex Line 10

Conditional

▶If the Last Name Line 10 field is completed, select the radio button next to one of the values listed below; otherwise, do not complete this field.◀

`M` Indicates the enrollee's tenth family member is male.

`F` Indicates the enrollee's tenth family member is female.

ZIP Line 10

▶*Conditional*◀*, alphanumeric, 11 positions max.*

▶If the Last Name Line 10 field is completed, type the domestic ZIP Code or foreign postal code of the enrollee's tenth family member who is enrolled/enrolling in FEHB; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◀

Other Insurance

Required

Select the radio button next to one of the following values:

Y Indicates the enrollee's family member is enrolled in another group health insurance program.

N Indicates the enrollee's family member is not enrolled in another group health insurance program.

Policyholder Last Name

Conditional, alphanumeric, 25 positions max.

If the Other Insurance field is **Y**, type the last name of the individual who holds the policy from another group health insurance program under which the enrollee or family member is covered. If the policyholder has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III). If the Other Insurance Field is **N**, do not complete this field.

Policyholder First Name

Conditional, alphanumeric, 17 positions max.

If the Other Insurance field is **Y**, type the first name of the individual who holds the policy from another group health insurance program under which the enrollee or family member is covered. If the Other Insurance Field is **N**, do not complete this field.

►**Note:** Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◄

Policyholder Initial

Conditional, alphanumeric, 1 position

If the Other Insurance field is **Y**, type the middle initial of the individual who holds the policy from another group health insurance program under which the enrollee or family member is covered. If the Other Insurance Field is **N**, do not complete this field.

►**Note:** Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◄

Medicare

You

Conditional

Select the check box next to one of the following values, if applicable:

A Indicates the enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by Medicare Part A.

B Indicates the enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by Medicare Part B.

Spouse

Conditional

Select the check box next to one of the following values, if applicable:

A Indicates the enrollee's spouse who is enrolled/enrolling in FEHB is covered by Medicare Part A.

B Indicates the enrollee's spouse who is enrolled/enrolling in FEHB is covered by Medicare Part B.

TRICARE/CHAMPUS

Conditional

If the enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by Tricare or Civilian Health and Medical Program of the Uniformed Services (CHAMPUS), click the check box next to TRICARE/CHAMPUS; otherwise, do not complete this field.

Other

Conditional

If the enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by a health insurance program other than Tricare or Civilian Health and Medical Program of the Uniformed Services (CHAMPUS), click the check box next to Other; otherwise, do not complete this field.

Name (Other)

Conditional, alphanumeric, 35 positions max

If the check box next to Other is selected, type the name of the health insurance program, other than Tricare or CHAMPUS, that covers the enrollee or enrollee's family member; otherwise, do not complete this field.

Form 2809 Add (Parts C and D) Page Field Instructions

The Form 2809 Add (Parts C and D) page (**Figure 2:57**) is used to create a Form 2809 (Parts C and D) record to correct carrier enrollee records and resolve identified discrepancies. For instructions on using the Form 2809 Add (Parts C and D) page, see **Adding A 2809 Record** in **Part 2**.

Present Plan

Conditional, alphanumeric, 35 positions max.

Type the name of the FEHB health insurance plan in which the enrollee is currently enrolled. If the Nature of Action in Part A is **`Change`**, this field is required. If the Nature of Action in Part A is **`Start`**, **`Stop`**, or **`Suspend`**, do not complete this field.

Enrollment Code

Conditional, alphanumeric, 3 positions

Type the enrollment code, which consists of the plan and option codes. If the Nature of Action in Part A is **`Change`**, **`Stop`**, or **`Suspend`**, this field is required. If the Nature of Action in Part A is **`Start`**, do not complete this field.

Event That Permits Change

Conditional

Click the drop-down menu and select the FEHB Event Code that identifies the event that initiated the enrollee's action. If the Nature of Action in Part A is **`Start`** or **`Change`**, this field is required. If the Nature of Action in Part A is **`Stop`** or **`Suspend`**, do not complete this field. Refer to SF-2809 or OPM-2809 for a list of Event Codes.

Date

Conditional, alphanumeric, 8 positions

Type the date (MMDDYYYY) of the event that initiated the enrollee's action. ►If the Nature of Action in Part A is **`Start`** or **`Change`**, this field is required. If the Nature of Action in Part A is **`Stop`** or **`Suspend`**, do not complete this field.◄

Will be covered under the enrollment of

Conditional

If the Nature of Action in Part A is **`Suspend`**, and the enrollee is suspending his/her FEHB enrollment because he/she will be covered as a family member under another person's FEHB enrollment, click the radio button; otherwise, do not complete this field.

SSN

Conditional, alphanumeric, 9 positions

►If the radio button next to "Will Be Covered Under The Enrollment Of" is selected, type the SSN of the person who is enrolled in FEHB and whose FEHB coverage will cover the family member who is suspending his/her own FEHB coverage. If the person who is providing the FEHB coverage does not want his/her SSN provided to the carrier, a pseudo SSN may be used.

Note: If the radio button next to "Will Be Covered Under The Enrollment Of" is selected, this field must be completed; otherwise, do not complete this field.◄

Last Name

Conditional, alphanumeric, 25 positions max.

►If the radio button next to "Will Be Covered Under The Enrollment Of" is selected, type the last name of the person who is enrolled in FEHB and whose FEHB coverage will cover the family member who is suspending his/her own FEHB coverage. If the enrollee who is providing the coverage has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

Note: If the radio button next to "Will Be Covered Under The Enrollment Of" is selected, this field must be completed; otherwise, do not complete this field.◄

First Name

Conditional, alphanumeric, 17 positions max.

►If the radio button next to "Will Be Covered Under The Enrollment Of" is selected, type the first name of the person who is enrolled in FEHB and whose FEHB coverage will cover the family member who is suspending his/her own FEHB coverage.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◄

Initial

Conditional, alphanumeric, 1 position

►If the radio button next to "Will Be Covered Under The Enrollment Of" is selected, type the middle initial of the person who is enrolled in FEHB and whose FEHB coverage will cover the family member who is suspending his/her own FEHB coverage.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◄

Enrolled in a Medicare Managed Care Plan.

Conditional

If the Nature of Action in Part A is **Suspend**, and the enrollee is suspending his/her FEHB enrollment because he/she will be covered by a Medicare Managed Care Plan (MMCP) or Tricare-For-Life plan, click the radio button; otherwise, do not complete this field.

Cancel enrollment for reasons other than above.

Conditional

If the Nature of Action in Part A is **Stop**, and the enrollee is canceling his/her FEHB enrollment, click the radio button; otherwise, do not complete this field.

Form 2809 Add (Part E) Page Field Instructions

The Form 2809 Add (Part E) page (**Figure 2:58**) is used to create a Form 2809 (Part E) record to correct carrier enrollee records and resolve identified discrepancies. For instructions on using the Form 2809 Add (Part E) page, see **Adding A 2809 Record** in **Part 2**.

Agency Name

Required, alphanumeric, 35 positions max.

Type the name of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage.

Address Line 1

Required, alphanumeric, 35 positions max.

Type the first line of the domestic or foreign street, PO box, rural route, etc., of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage.

Address Line 2

▶*Conditional*◀*, alphanumeric, 35 positions max.*

▶If applicable, type the second line of the domestic or foreign street, PO box, rural route, etc., of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◀

Address Line 3

▶*Conditional*◀*, alphanumeric, 35 positions max.*

▶If applicable, type the third line of the domestic or foreign street, PO box, rural route, etc., of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◀

City

Required, alphanumeric, 23 positions max.

Type the name of the domestic or foreign city for the enrollee's employing, personnel, or point-of-contact office.

Note: If the address is an overseas military address, type FPO for fleet post office or APO for army post office in lieu of the city.

State

Conditional

Click the drop-down menu and select the state, U.S. territory, or overseas military abbreviation for the enrollee's employing, personnel, or point-of-contact office. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory, And Overseas Military Abbreviations Table** in **Part 4**.

Note: If the address contains a state, U.S. territory, or overseas military abbreviation, this field is required; otherwise, do not complete this field.

ZIP

Conditional, alphanumeric, 11 positions max.

Type the enrollee's domestic ZIP Code or foreign postal code for the enrollee's employing, personnel, or point-of-contact office.

Note: If the State field is completed, a ZIP code must be entered. If the State field is not completed, this field is optional.

Country

Conditional

Click the drop-down menu and select the country code for the enrollee's employing, personnel, or point-of-contact office. For a list and descriptions of country codes, see **Country Codes Table** in **Part 4**.

Note: If the State field is completed, do not complete this field. If the State field is not completed, and the address is from a country other than the United States, a country code must be entered.

Agency ID

Optional, alphanumeric, 4 positions

Type the agency identification code of the enrollee's employing, personnel, or point-of-contact office (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

Personnel Office ID

►Required◄ alphanumeric, 4 positions

Type the personnel office number for the enrollee's employing, personnel, or point-of-contact office.

►**Note:** Although the system allows for a blank field, this field **must** be completed.◄

Authorized Official

Last Name

Required, alphanumeric, 25 positions max.

Type the last name of the agency official who is authorized to sign the Form 2809. If the agency official has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

First Name

Optional, alphanumeric, 17 positions max.

Type the first name of the agency official who is authorized to sign the Form 2809.

Note: Although the system allows for a blank field, please complete this field if the data is available.

Initial

Optional, alphanumeric, 1 position

Type the middle initial of the agency official who is authorized to sign the Form 2809.

Note: Although the system allows for a blank field, please complete this field if the data is available.

Phone

Optional, numeric, 17 positions max.

Type the authorized agency official's daytime area code and telephone number. **Do not** type alpha characters, spaces, dashes, parentheses, periods, etc.

Note: Although the system allows for a blank field, please complete this field if the data is available.

Date Signed

Required, alphanumeric, 8 positions

Type the date (MMDDYYYY) the authorized agency official signed the document.

Contact (Personnel)

Last Name

Conditional, alphanumeric, 25 positions max.

Type the personnel office contact's last name. If the contact has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

Note: If the Last Name field under Contact (Payroll) is not completed, this field is required; otherwise, this field is optional.

First Name

Conditional, alphanumeric, 17 positions max.

If the Last Name field under Contact (Personnel) is completed, type the personnel office contact's first name.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.

Initial

Conditional, alphanumeric, 1 position

If the Last Name field under Contact (Personnel) is completed, type the personnel office contact's middle initial.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.

Phone

Conditional, numeric, 7 positions max.

If the Last Name field under Contact (Personnel) is completed, type the personnel office contact's daytime area code and telephone number. **Do not** type alpha characters, spaces, dashes, parentheses, periods, etc.

Note: Although the system allows for a blank field, this field **must** be completed if the condition applies.

Contact (Payroll)

Last Name

Conditional, alphanumeric, 25 positions max.

Type the payroll office contact's last name. If the contact has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

Note: If the Last Name field under Contact (Personnel) is not completed, this field is required; otherwise, this field is optional.

First Name

Conditional, alphanumeric, 17 positions max.

If the Last Name field under Contact (Payroll) is completed, type the payroll office contact's first name.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.

Initial

Conditional, alphanumeric, 1 position

If the Last Name field under Contact (Payroll) is completed, type the payroll office contact's middle initial.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.

Phone

Conditional, numeric, 7 positions max.

If the Last Name field under Contact (Payroll) is completed, type the payroll office contact's daytime area code and telephone number. **Do not** type alpha characters, spaces, dashes, parentheses, periods, etc.

Note: Although the system allows for a blank field, this field **must** be completed if the condition applies.

Effective Date

Required, alphanumeric, 8 positions

Type the date (MMDDYYYY) the requested action goes into effect.

Date Received

Required, alphanumeric, 8 positions

Type the date (MMDDYYYY) the agency received the original 2809 form.

Date of Action

Required, alphanumeric, 8 positions

Type the date (MMDDYYYY) the enrollee made this election.

Report #

Optional, alphanumeric, ►7 positions max.◄

►Type the number of the original report (e.g., notification to carrier, transmittal number, etc.).◄

Claim #

Optional, alphanumeric, 9 positions

Type the claim number assigned by OPM, other retirement systems, or the Office of Workers' Compensation Programs (i.e., CSA, CSF, or compensation number).

HB ID#

Optional, alphanumeric, 9 positions

Type the SSN of the retiree, or in the case of a survivor annuitant, the SSN of the deceased retiree/employee. The HB identification number is the SSN of the person to whom the policy was originally issued and it will not change. The SSN field can and does change at the death of the annuitant, but the HB identification number does not.

Remarks

Optional, alphanumeric, 400 positions max.

Type remarks regarding the creation of this record.

Form 2809 Search Results Page Field Descriptions

The Form 2809 Search Results page (**Figure 2:59**) displays a list of Form 2809 records resulting from the search criteria entered on the Form 2809 page (**Figure 2:54**). For instructions on using the Form 2809 Search Results page, see **Maintaining 2809 Records** in **Part 2**.

Payroll Office ID

No entry

This field is system generated. This is the payroll office identification number.

Year

No entry

This field is system generated. This is the reconciliation year.

Quarter

No entry

This field is system generated. This is the reconciliation quarter.

Enrollee SSN

No entry

This field is system generated. ►This is the enrollee's social security number (SSN) or pseudo SSN.◄

Last Name

No entry

This field is system generated. This is the enrollee's last name.

First Name

No entry

This field is system generated. This is the enrollee's first name.

Release Date

No entry

This field is system generated. This is the date the record was released for processing.

Released By

No entry

This field is system generated. This is the user identification number of the individual who released the record for processing.

Status

No entry

This field is system generated. This is the status of the transmission. This field is populated by one of the following: Processed, Canceled, Released, or Not Released.

Form 2809 View (Part A) Page Field Descriptions

The Form 2809 View (Part A) page (**Figure 2:60**) displays a selected Form 2809 (Part A) record. For instructions on using the Form 2809 View (Part A) page, see **Viewing A 2809 Record** in **Part 2**.

Payroll Office ID

No entry

This field is system generated. This is the payroll office identification number.

Year

No entry

This field is system generated. This is the reconciliation year.

Quarter

No entry

This field is system generated. This is the reconciliation quarter.

Personnel Office ID

No entry

This field is system generated. This is the personnel office identifier.

Nature of Action

Start

No entry

This field is system generated. A selected radio button indicates enrollment in FEHB.

Change

No entry

This field is system generated. A selected radio button indicates a change to a current FEHB enrollment.

Suspend

No entry

This field is system generated. A selected radio button indicates a suspension of an FEHB enrollment.

Stop

No entry

This field is system generated. A selected radio button indicates the cancellation of an FEHB enrollment.

Last Name

No entry

This field is system generated. This is the enrollee’s last name.

First Name

No entry

This field is system generated. This is the enrollee’s first name.

Initial

No entry

This field is system generated. This is the enrollee’s middle initial.

Address Line 1

No entry

This field is system generated. This is the first line of the enrollee’s domestic or foreign street, apartment number, PO box, rural route, etc.

Address Line 2

No entry

This field is system generated. This is the second line of the enrollee’s domestic or foreign street, apartment number, PO box, rural route, etc.

Address Line 3

No entry

This field is system generated. This is the third line of the enrollee’s domestic or foreign street, apartment number, PO box, rural route, etc.

City

No entry

This field is system generated. This is the name of the enrollee’s domestic or foreign city.

Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.

State

No entry

This field is system generated. This is the enrollee's state, U.S. territory, or overseas military abbreviation. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory, And Overseas Military Abbreviations Table** in **Part 4**.

ZIP

No entry

This field is system generated. This is the enrollee's domestic ZIP Code or foreign postal code.

Country

No entry

This field is system generated. This is the enrollee's country code. For a list and descriptions of country codes, see **Country Codes Table** in **Part 4**.

SSN

No entry

This field is system generated. ►This is the enrollee's social security number (SSN) or pseudo SSN.◄

Date of Birth

No entry

This field is system generated. This is the enrollee's date of birth.

Sex

No entry

The values listed below indicate the following:

M A selected radio button indicates the enrollee is male.
F A selected radio button indicates the enrollee is female.

Married

No entry

The values listed below indicate the following:

Y A selected radio button indicates the enrollee is married.
N A selected radio button indicates the enrollee is single.

Phone

No entry

This field is system generated. This is the enrollee's daytime area code and telephone number.

Last Changed

ID

No entry

This field is system generated. This is the user identification number of the individual who made the most recent change to the record.

CLER Field Descriptions And Instructions

Date

No entry

This field is system generated. This is the date of the most recent change.

Time

No entry

This field is system generated. This is the time of the most recent change.

Released

ID

No entry

This field is system generated. This is the user identification number of the individual who released the record for processing.

Date

No entry

This field is system generated. This is the date the record was released for processing.

Time

No entry

This field is system generated. This is the time the record was released for processing.

Processed

Date

No entry

This field is system generated. This is the date the record was processed.

Time

No entry

This field is system generated. This is the time the record was processed.

Form 2809 View (Part B) Page Field Descriptions

The Form 2809 View (Part B) page (**Figure 2:61**) displays a selected Form 2809 (Part B) record. For instructions on using the Form 2809 View (Part B) page, see **Viewing A 2809 Record** in **Part 2**.

Plan Name

No entry

This field is system generated. This is the name of the FEHB health insurance plan in which the individual is enrolled/enrolling.

Enrollment Code

No entry

This field is system generated. This is the enrollment code, which consists of the plan and option codes.

Last Name Line 1

No entry

This field is system generated. This is the last name of the enrollee's first family member who is enrolled/enrolling in FEHB.

First Name Line 1

No entry

This field is system generated. This is the first name of the enrollee's first family member who is enrolled/enrolling in FEHB.

Initial Line 1

No entry

This field is system generated. This is the middle initial of the enrollee's first family member who is enrolled/enrolling in FEHB.

Date of Birth Line 1

No entry

This field is system generated. This is the date of birth (MMDDYYYY) of the enrollee's first family member who is enrolled/enrolling in FEHB.

Code Line 1

No entry

This field is system generated. This code identifies the first family member's relation to the enrollee. The following are relationship codes: 1 for Spouse; 2 for Unmarried dependent child under age 22 (including an adopted child); 3 for Stepchild, foster child, or recognized natural child; 4 for Unmarried disabled child over age 22 incapable of self-support; and 5 for Parent of dependent survivor annuitant.

SSN Line 1

No entry

This field is system generated. This is the SSN of the enrollee's first family member who is enrolled/enrolling in FEHB.

Sex Line 1

No entry

The values listed below indicate the following:

- **M** A selected radio button indicates the enrollee's first family member who is enrolled/enrolling in FEHB is male.
- **F** A selected radio button indicates the enrollee's first family member who is enrolled/enrolling in FEHB is female.

ZIP Line 1

No entry

This field is system generated. This is the domestic ZIP Code or foreign postal code of the enrollee's first family member who is enrolled/enrolling in FEHB.

Last Name Line 2

No entry

This field is system generated. This is the last name of the enrollee's second family member who is enrolled/enrolling in FEHB.

First Name Line 2

No entry

This field is system generated. This is the first name of the enrollee's second family member who is enrolled/enrolling in FEHB.

Initial Line 2

No entry

This field is system generated. This is the middle initial of the enrollee's second family member who is enrolled/enrolling in FEHB.

Date of Birth Line 2

No entry

This field is system generated. This is the date of birth (MMDDYYYY) of the enrollee's second family member who is enrolled/enrolling in FEHB.

Code Line 2

No entry

This field is system generated. This code identifies the second family member's relation to the enrollee. The following are relationship codes: 1 for Spouse; 2 for Unmarried dependent child under age 22 (including an adopted child); 3 for Stepchild, foster child, or recognized natural child; 4 for Unmarried disabled child over age 22 incapable of self-support; and 5 for Parent of dependent survivor annuitant.

SSN Line 2

No entry

This field is system generated. This is the SSN of the enrollee's second family member who is enrolled/enrolling in FEHB.

Sex Line 2

No entry

The values listed below indicate the following:

M A selected radio button indicates the enrollee's second family member who is enrolled/enrolling in FEHB is male.

F A selected radio button indicates the enrollee's second family member who is enrolled/enrolling in FEHB is female.

ZIP Line 2

No entry

This field is system generated. This is the domestic ZIP Code or foreign postal code of the enrollee's second family member who is enrolled/enrolling in FEHB.

Last Name Line 3

No entry

This field is system generated. This is the last name of the enrollee's third family member who is enrolled/enrolling in FEHB.

First Name Line 3

No entry

This field is system generated. This is the first name of the enrollee's third family member who is enrolled/enrolling in FEHB.

Initial Line 3

No entry

This field is system generated. This is the middle initial of the enrollee's third family member who is enrolled/enrolling in FEHB.

Date of Birth Line 3

No entry

This field is system generated. This is the date of birth (MMDDYYYY) of the enrollee's third family member who is enrolled/enrolling in FEHB.

Code Line 3

No entry

This field is system generated. This code identifies the third family member's relation to the enrollee. The following are relationship codes: 1 for Spouse; 2 for Unmarried dependent child under age 22 (including an adopted child); 3 for Stepchild, foster child, or recognized natural child; 4 for Unmarried disabled child over age 22 incapable of self-support; and 5 for Parent of dependent survivor annuitant.

SSN Line 3

No entry

This field is system generated. This is the SSN of the enrollee's third family member who is enrolled/enrolling in FEHB.

Sex Line 3

No entry

The values listed below indicate the following:

M A selected radio button indicates the enrollee's third family member who is enrolled/enrolling in FEHB is male.

F A selected radio button indicates the enrollee's third family member who is enrolled/enrolling in FEHB is female.

ZIP Line 3

No entry

This field is system generated. This is the domestic ZIP Code or foreign postal code of the enrollee's third family member who is enrolled/enrolling in FEHB.

Last Name Line 4

No entry

This field is system generated. This is the last name of the enrollee's fourth family member who is enrolled/enrolling in FEHB.

First Name Line 4

No entry

This field is system generated. This is the first name of the enrollee's fourth family member who is enrolled/enrolling in FEHB.

Initial Line 4

No entry

This field is system generated. This is the middle initial of the enrollee's fourth family member who is enrolled/enrolling in FEHB.

Date of Birth Line 4

No entry

This field is system generated. This is the date of birth (MMDDYYYY) of the enrollee's fourth family member who is enrolled/enrolling in FEHB.

Code Line 4

No entry

This field is system generated. This code identifies the fourth family member's relation to the enrollee. The following are relationship codes: 1 for Spouse; 2 for Unmarried dependent child under age 22 (including an adopted child); 3 for Stepchild, foster child, or recognized natural child; 4 for Unmarried disabled child over age 22 incapable of self-support; and 5 for Parent of dependent survivor annuitant.

SSN Line 4

No entry

This field is system generated. This is the SSN of the enrollee's fourth family member who is enrolled/enrolling in FEHB.

Sex Line 4

No entry

The values listed below indicate the following:

- **M** A selected radio button indicates the enrollee's fourth family member who is enrolled/enrolling in FEHB is male.
- **F** A selected radio button indicates the enrollee's fourth family member who is enrolled/enrolling in FEHB is female.

ZIP Line 4

No entry

This field is system generated. This is the domestic ZIP Code or foreign postal code of the enrollee's fourth family member who is enrolled/enrolling in FEHB.

Last Name Line 5

No entry

This field is system generated. This is the last name of the enrollee's fifth family member who is enrolled/enrolling in FEHB.

First Name Line 5

No entry

This field is system generated. This is the first name of the enrollee's fifth family member who is enrolled/enrolling in FEHB.

Initial Line 5

No entry

This field is system generated. This is the middle initial of the enrollee's fifth family member who is enrolled/enrolling in FEHB.

Date of Birth Line 5

No entry

This field is system generated. This is the date of birth (MMDDYYYY) of the enrollee's fifth family member who is enrolled/enrolling in FEHB.

Code Line 5

No entry

This field is system generated. This code identifies the fifth family member's relation to the enrollee. The following are relationship codes: 1 for Spouse; 2 for Unmarried dependent child under age 22 (including an adopted child); 3 for Stepchild, foster child, or recognized natural child; 4 for Unmarried disabled child over age 22 incapable of self-support; and 5 for Parent of dependent survivor annuitant.

SSN Line 5

No entry

This field is system generated. This is the SSN of the enrollee's fifth family member who is enrolled/enrolling in FEHB.

Sex Line 5

No entry

The values listed below indicate the following:

M A selected radio button indicates the enrollee's fifth family member who is enrolled/enrolling in FEHB is male.

F A selected radio button indicates the enrollee's fifth family member who is enrolled/enrolling in FEHB is female.

ZIP Line 5

No entry

This field is system generated. This is the domestic ZIP Code or foreign postal code of the enrollee's fifth family member who is enrolled/enrolling in FEHB.

Last Name Line 6

No entry

This field is system generated. This is the last name of the enrollee's sixth family member who is enrolled/enrolling in FEHB.

First Name Line 6

No entry

This field is system generated. This is the first name of the enrollee's sixth family member who is enrolled/enrolling in FEHB.

Initial Line 6

No entry

This field is system generated. This is the middle initial of the enrollee's sixth family member who is enrolled/enrolling in FEHB.

Date of Birth Line 6

No entry

This field is system generated. This is the date of birth (MMDDYYYY) of the enrollee's sixth family member who is enrolled/enrolling in FEHB.

Code Line 6

No entry

This field is system generated. This code identifies the sixth family member's relation to the enrollee. The following are relationship codes: 1 for Spouse; 2 for Unmarried dependent child under age 22 (including an adopted child); 3 for Stepchild, foster child, or recognized natural child; 4 for Unmarried disabled child over age 22 incapable of self-support; and 5 for Parent of dependent survivor annuitant.

SSN Line 6

No entry

This field is system generated. This is the SSN of the enrollee's sixth family member who is enrolled/enrolling in FEHB.

Sex Line 6

No entry

The values listed below indicate the following:

M	A selected radio button indicates the enrollee's sixth family member who is enrolled/enrolling in FEHB is male.
F	A selected radio button indicates the enrollee's sixth family member who is enrolled/enrolling in FEHB is female.

ZIP Line 6

No entry

This field is system generated. This is the domestic ZIP Code or foreign postal code of the enrollee's sixth family member who is enrolled/enrolling in FEHB.

Last Name Line 7

No entry

This field is system generated. This is the last name of the enrollee's seventh family member who is enrolled/enrolling in FEHB.

First Name Line 7

No entry

This field is system generated. This is the first name of the enrollee's seventh family member who is enrolled/enrolling in FEHB.

Initial Line 7

No entry

This field is system generated. This is the middle initial of the enrollee's seventh family member who is enrolled/enrolling in FEHB.

Date of Birth Line 7

No entry

This field is system generated. This is the date of birth (MMDDYYYY) of the enrollee's seventh family member who is enrolled/enrolling in FEHB.

Code Line 7

No entry

This field is system generated. This code identifies the seventh family member's relation to the enrollee. The following are relationship codes: 1 for Spouse; 2 for Unmarried dependent child under age 22 (including an adopted child); 3 for Stepchild, foster child, or recognized natural child; 4 for Unmarried disabled child over age 22 incapable of self-support; and 5 for Parent of dependent survivor annuitant.

SSN Line 7

No entry

This field is system generated. This is the SSN of the enrollee's seventh family member who is enrolled/enrolling in FEHB.

Sex Line 7

No entry

The values listed below indicate the following:

M	A selected radio button indicates the enrollee's seventh family member who is enrolled/enrolling in FEHB is male.
F	A selected radio button indicates the enrollee's seventh family member who is enrolled/enrolling in FEHB is female.

ZIP Line 7

No entry

This field is system generated. This is the domestic ZIP Code or foreign postal code of the enrollee's seventh family member who is enrolled/enrolling in FEHB.

Last Name Line 8

No entry

This field is system generated. This is the last name of the enrollee's eighth family member who is enrolled/enrolling in FEHB.

First Name Line 8

No entry

This field is system generated. This is the first name of the enrollee's eighth family member who is enrolled/enrolling in FEHB.

Initial Line 8

No entry

This field is system generated. This is the middle initial of the enrollee's eighth family member who is enrolled/enrolling in FEHB.

Date of Birth Line 8

No entry

This field is system generated. This is the date of birth (MMDDYYYY) of the enrollee's eighth family member who is enrolled/enrolling in FEHB.

Code Line 8

No entry

This field is system generated. This code identifies the eighth family member's relation to the enrollee. The following are relationship codes: 1 for Spouse; 2 for Unmarried dependent child under age 22 (including an adopted child); 3 for Stepchild, foster child, or recognized natural child; 4 for Unmarried disabled child over age 22 incapable of self-support; and 5 for Parent of dependent survivor annuitant.

SSN Line 8

No entry

This field is system generated. This is the SSN of the enrollee's eighth family member who is enrolled/enrolling in FEHB.

Sex Line 8

No entry

The values listed below indicate the following:

- **M** A selected radio button indicates the enrollee's eighth family member who is enrolled/enrolling in FEHB is male.
- **F** A selected radio button indicates the enrollee's eighth family member who is enrolled/enrolling in FEHB is female.

ZIP Line 8

No entry

This field is system generated. This is the domestic ZIP Code or foreign postal code of the enrollee's eighth family member who is enrolled/enrolling in FEHB.

Last Name Line 9

No entry

This field is system generated. This is the last name of the enrollee's ninth family member who is enrolled/enrolling in FEHB.

First Name Line 9

No entry

This field is system generated. This is the first name of the enrollee's ninth family member who is enrolled/enrolling in FEHB.

Initial Line 9

No entry

This field is system generated. This is the middle initial of the enrollee's ninth family member who is enrolled/enrolling in FEHB.

Date of Birth Line 9

No entry

This field is system generated. This is the date of birth (MMDDYYYY) of the enrollee's ninth family member who is enrolled/enrolling in FEHB.

Code Line 9

No entry

This field is system generated. This code identifies the ninth family member's relation to the enrollee. The following are relationship codes: 1 for Spouse; 2 for Unmarried dependent child under age 22 (including an adopted child); 3 for Stepchild, foster child, or recognized natural child; 4 for Unmarried disabled child over age 22 incapable of self-support; and 5 for Parent of dependent survivor annuitant.

SSN Line 9

No entry

This field is system generated. This is the SSN of the enrollee's ninth family member who is enrolled/enrolling in FEHB.

Sex Line 9

No entry

The values listed below indicate the following:

- `M` A selected radio button indicates the enrollee's ninth family member who is enrolled/enrolling in FEHB is male.
- `F` A selected radio button indicates the enrollee's ninth family member who is enrolled/enrolling in FEHB is female.

ZIP Line 9

No entry

This field is system generated. This is the domestic ZIP Code or foreign postal code of the enrollee's ninth family member who is enrolled/enrolling in FEHB.

Last Name Line 10

No entry

This field is system generated. This is the last name of the enrollee's tenth family member who is enrolled/enrolling in FEHB.

First Name Line 10

No entry

This field is system generated. This is the first name of the enrollee's tenth family member who is enrolled/enrolling in FEHB.

Initial Line 10

No entry

This field is system generated. This is the middle initial of the enrollee's tenth family member who is enrolled/enrolling in FEHB.

Date of Birth Line 10

No entry

This field is system generated. This is the date of birth (MMDDYYYY) of the enrollee's tenth family member who is enrolled/enrolling in FEHB.

Code Line 10

No entry

This field is system generated. This code identifies the tenth family member's relation to the enrollee. The following are relationship codes: 1 for Spouse; 2 for Unmarried dependent child under age 22 (including an adopted child); 3 for Stepchild, foster child, or recognized natural child; 4 for Unmarried disabled child over age 22 incapable of self-support; and 5 for Parent of dependent survivor annuitant.

SSN Line 10

No entry

This field is system generated. This is the SSN of the enrollee's tenth family member who is enrolled/enrolling in FEHB.

Sex Line 10

No entry

The values listed below indicate the following:

- **M** A selected radio button indicates the enrollee's tenth family member who is enrolled/enrolling in FEHB is male.
- **F** A selected radio button indicates the enrollee's tenth family member who is enrolled/enrolling in FEHB is female.

ZIP Line 10

No entry

This field is system generated. This is the domestic ZIP Code or foreign postal code of the enrollee's tenth family member who is enrolled/enrolling in FEHB.

Other Insurance

No entry

The values listed below indicate the following:

- **Y** A selected radio button indicates the enrollee's family member is enrolled in another group health insurance program.
- **N** A selected radio button indicates the enrollee's family member is not enrolled in another group health insurance program.

Policyholder Last Name

No entry

This field is system generated. This is the last name of the individual who holds the policy from another group health insurance program under which the enrollee or family member is covered.

Policyholder First Name

No entry

This field is system generated. This is the first name of the individual who holds the policy from another group health insurance program under which the enrollee or family member is covered.

Policyholder Initial

No entry

This field is system generated. This is the middle initial of the individual who holds the policy from another group health insurance program under which the enrollee or family member is covered.

Medicare

You

No entry

The values listed below indicate the following:

A A selected check box indicates the enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by Medicare Part A.

B A selected check box indicates the enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by Medicare Part B.

Spouse

No entry

The values listed below indicate the following:

A A selected check box indicates the enrollee's spouse who is enrolled/enrolling in FEHB is covered by Medicare Part A.

B A selected check box indicates the enrollee's spouse who is enrolled/enrolling in FEHB is covered by Medicare Part B.

TRICARE/CHAMPUS

No entry

This field is system generated. A selected check box indicates that the enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by Tricare or Civilian Health and Medical Program of the Uniformed Services (CHAMPUS).

Other

No entry

This field is system generated. A selected check box indicates that the enrollee or enrollee's family member who is enrolled/enrolling in FEHB is covered by a health insurance program other than Tricare or Civilian Health and Medical Program of the Uniformed Services (CHAMPUS).

Name (Other)

No entry

This field is system generated. This is the name of the health insurance program other than Tricare or CHAMPUS that covers the enrollee or enrollee's family member.

Form 2809 View (Parts C and D) Page Field Descriptions

The Form 2809 View (Parts C and D) page (**Figure 2:62**) displays a selected Form 2809 (Parts C and D) record. For instructions on using the Form 2809 View (Parts C and D) page, see **Viewing A 2809 Record** in **Part 2**.

Present Plan

No entry

This field is system generated. This is the name of the FEHB health insurance plan in which the enrollee is currently enrolled.

Enrollment Code

No entry

This field is system generated. This is the enrollment code, which consists of the plan and option codes.

Event That Permits Change

No entry

This field is system generated. This is the FEHB Event Code that identifies the event that initiated the enrollee's action. Refer to SF-2809 or OPM-2809 for a list of Event Codes.

Date

No entry

This field is system generated. This is the date (MMDDYYYY) of the event that initiated the enrollee's action.

Will be covered under the enrollment of

No entry

This field is system generated. A selected radio button indicates the enrollee is suspending his/her FEHB enrollment because he/she will be covered as a family member under another person's FEHB enrollment.

SSN

No entry

This field is system generated. This is the SSN of the person who is enrolled in FEHB and whose FEHB coverage will cover the family member who is suspending his/her own FEHB coverage.

Last Name

No entry

This field is system generated. This is the last name of the person who is enrolled in FEHB and whose FEHB coverage will cover the family member who is suspending his/her own FEHB coverage.

First Name

No entry

This field is system generated. This is the first name of the person who is enrolled in FEHB and whose FEHB coverage will cover the family member who is suspending his/her own FEHB coverage.

Initial

No entry

This field is system generated. This is the middle initial of the person who is enrolled in FEHB and whose FEHB coverage will cover the family member who is suspending his/her own FEHB coverage.

Enrolled in a Medicare Managed Care Plan.

No entry

This field is system generated. A selected radio button indicates the enrollee who is suspending his/her FEHB enrollment because he/she will be covered by a Medicare Managed Care Plan (MMCP) or Tricare-For-Life plan.

Cancel enrollment for reasons other than above.

No entry

This field is system generated. A selected radio button indicates the enrollee is canceling his/her FEHB enrollment.

Form 2809 View (Part E) Page Field Descriptions

The Form 2809 View (Part E) page (**Figure 2:63**) displays a selected Form 2809 (Part E) record. For instructions on using the Form 2809 View (Part E) page, see **Viewing A 2809 Record** in **Part 2**.

Agency Name

No entry

This field is system generated. This is the name of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage.

Address Line 1

No entry

This field is system generated. This is the first line of the domestic or foreign street, PO box, rural route, etc., of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage.

Address Line 2

No entry

This field is system generated. This is the second line of the domestic or foreign street, PO box, rural route, etc., of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage.

Address Line 3

No entry

This field is system generated. This is the third line of the domestic or foreign street, PO box, rural route, etc., of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage.

City

No entry

This field is system generated. This is the name of the domestic or foreign city for the enrollee's employing, personnel, or point-of-contact office.

Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.

State

No entry

This field is system generated. This is the state, U.S. territory, or overseas military abbreviation for the enrollee's employing, personnel, or point-of-contact office. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory, And Overseas Military Abbreviations Table** in **Part 4**.

ZIP

No entry

This field is system generated. This is the domestic ZIP Code or foreign postal code for the enrollee's employing, personnel, or point-of-contact office.

Country

No entry

This field is system generated. This is the country code for the enrollee's employing, personnel, or point-of-contact office. For a list and descriptions of country codes, see **Country Codes Table** in **Part 4**.

Agency ID

No entry

This field is system generated. This is the agency identification code of the enrollee's employing, personnel, or point-of-contact office (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

Personnel Office ID

No entry

This field is system generated. This is the personnel office number for the enrollee's employing, personnel, or point-of-contact office.

Authorized Official

Last Name

No entry

This field is system generated. This is the last name of the agency official who is authorized to sign the Form 2809.

First Name

No entry

This field is system generated. This is the first name of the agency official who is authorized to sign the Form 2809.

Initial

No entry

This field is system generated. This is the middle initial of the agency official who is authorized to sign the Form 2809.

Phone

No entry

This field is system generated. This is the authorized agency official's daytime area code and telephone number.

Date Signed

No entry

This field is system generated. This is the date the authorized agency official signed the document.

Contact (Personnel)

Last Name

No entry

This field is system generated. This is the personnel office contact's last name.

First Name

No entry

This field is system generated. This is the personnel office contact's first name.

Initial

No entry

This field is system generated. This is the personnel office contact's middle initial.

Phone

No entry

This field is system generated. This is the personnel office contact's daytime area code and telephone number.

Contact (Payroll)

Last Name

No entry

This field is system generated. This is the payroll office contact's last name.

First Name

No entry

This field is system generated. This is the payroll office contact's first name.

Initial

No entry

This field is system generated. This is the payroll office contact's middle initial.

Phone

No entry

This field is system generated. This is the payroll office contact's daytime area code and telephone number.

Effective Date

No entry

This field is system generated. This is the date (MMDDYYYY) the requested action goes into effect.

Date Received

No entry

This field is system generated. This is the date (MMDDYYYY) the agency received the original 2809 form.

Date of Action

No entry

This field is system generated. This is the date (MMDDYYYY) the enrollee made this election.

Report #

No entry

This field is system generated. ►This is the number of the original report (e.g., notification to carrier, transmittal number, etc.).◄

Claim #

No entry

This field is system generated. This is the claim number assigned by OPM, other retirement systems, or the Office of Workers' Compensation Programs (i.e., CSA, CSF, or compensation number).

HB ID#

No entry

This field is system generated. This is the SSN of the retiree, or in the case of a survivor annuitant, the SSN of the deceased retiree/employee. The HB identification number is the SSN of the person to whom the policy was originally issued and it will not change. The SSN field can and does change at the death of the annuitant, but the HB identification number does not.

Remarks

No entry

This field is system generated. These are the remarks regarding the creation of this record.

Form 2809 Update (Part A) Page Field Instructions

The Form 2809 Update (Part A) page (**Figure 2:64**) is used to update the data on a selected Form 2809 (Part A) record. For instructions on using the Form 2809 Update (Part A) page, see **Updating A 2809 Record** in **Part 2**. For field instructions, see **Form 2809 Add (Part A) Page Field Instructions** in **Part 3**.

Form 2809 Update (Part B) Page Field Instructions

The Form 2809 Update (Part B) page (**Figure 2:65**) is used to update the data on a selected Form 2809 (Part B) record. For instructions on using the Form 2809 Update (Part B) page, see **Updating A 2809 Record** in **Part 2**. For field instructions, see **Form 2809 Add (Part B) Page Field Instructions** in **Part 3**.

Form 2809 Update (Parts C and D) Page Field Instructions

The Form 2809 Update (Parts C and D) page (**Figure 2:66**) is used to update the data on a selected Form 2809 (Parts C and D) record. For instructions on using the Form 2809 Update (Parts C and D) page, see **Updating A 2809 Record** in **Part 2**. For field instructions, see **Form 2809 Add (Part C and D) Page Field Instructions** in **Part 3**.

Form 2809 Update (Part E) Page Field Instructions

The Form 2809 Update (Part E) page (**Figure 2:67**) is used to update the data on a selected Form 2809 (Part E) record. For instructions on using the Form 2809 Update (Part E) page, see **Updating A 2809 Record** in **Part 2**. For field instructions, see **Form 2809 Add (Part E) Page Field Instructions** in **Part 3**.

Form 2810 Page Field Instructions

The Form 2810 page (**Figure 2:68**) is used to search for Form 2810 records by payroll office ID, year, etc. For instructions on using the Form 2810 page, see **Maintaining 2810 Records** in **Part 2**.

Payroll Office ID

Required

Click the drop-down menu and select the payroll office identification number.

Year

Optional default

Click the drop-down menu and select the reconciliation year. If no year is selected, this field automatically defaults to the current reconciliation year.

Quarter

Optional default

Click the drop-down menu and select the reconciliation quarter. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

Agency ID

Optional, alphanumeric, 4 positions

Type the agency identification code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

POI

Optional, alphanumeric, 4 positions

Type the personnel office identifier of the office where the enrollee's records are maintained.

Enrollment Code

Optional, alphanumeric, 3 positions

Type the enrollment code.

SSN

Optional, alphanumeric, 9 positions

►Type the enrollee's social security number (SSN) or pseudo SSN.◄

User ID

Optional, alphanumeric, 8 positions max.

Type the user identification number of the person creating the form.

CLER Field Descriptions And Instructions

Last Name

Optional, alphanumeric, 25 positions max.

Type the enrollee's last name. If the enrollee has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

First Name

Optional, alphanumeric, 17 positions max.

Type the enrollee's first name.

Initial

Optional, alphanumeric, 1 position

Type the enrollee's middle initial.

Display

Optional default

This field allows users to display search results by the options listed below. If no display option is selected, this field automatically defaults to the All option. To choose a display option, select the radio button next to one of the following values:

All	Displays all records related to the search criteria.
Released	Displays all records released for processing.
Cancelled	Displays all records that were cancelled before being processed.
Not Released	Displays all records not released for processing.
Processed	Displays all processed records.

Order By

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the Agency ID sort option. To choose a sort option, select the radio button next to one of the following values:

Agency ID	Sorts search results by agency ID.
SSN	Sorts search results by enrollee social security number.
Name	Sorts search results by enrollee name.
User ID	Sorts search results by user ID.
Status	Sorts search results by status (i.e., released, processed, not released, or cancelled release).

Form 2810 Add (Part A) Page Field Instructions

The Form 2810 Add (Part A) page (**Figure 2:69**) is used to create a Form 2810 (Part A) record to correct carrier enrollee records and resolve identified discrepancies. For instructions on using the Form 2810 Add (Part A) page, see **Adding A 2810 Record** in **Part 2**.

Payroll Office ID

Required

Click the drop-down menu and select the payroll office identification number for the 2810 being created.

Year

Optional default

Click the drop-down menu and select the reconciliation year for the 2810 form being created. If no year is selected, this field automatically defaults to the current reconciliation year.

Quarter

Optional default

Click the drop-down menu and select the reconciliation quarter for the 2810 form being created. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

Personnel Office ID

Conditional, alphanumeric, 4 positions

If access is limited to a specific personnel office identifier code, type that code.

Last Name

Required, alphanumeric, 25 positions max.

Type the enrollee’s last name. If the enrollee has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

First Name

Required, alphanumeric, 17 positions max.

Type the enrollee’s first name.

Initial

Optional, alphanumeric, 1 position

Type the enrollee’s middle initial.

Note: Although the system allows for a blank field, please complete this field if the data is available.

Address Line 1

Conditional, alphanumeric, 35 positions max.

Type the first line of the enrollee’s domestic or foreign street, apartment number, PO box, rural route, etc., if applicable.

Note: Although the system allows for a blank field, please complete this field if the condition applies.

Address Line 2

Conditional, alphanumeric, 35 positions max.

Type the second line of the enrollee’s domestic or foreign street, apartment number, PO box, rural route, etc., if applicable.

Note: Although the system allows for a blank field, please complete this field if the condition applies.

Address Line 3

Conditional, alphanumeric, 35 positions max.

Type the third line of the enrollee's domestic or foreign street, apartment number, PO box, rural route, etc., if applicable.

Note: Although the system allows for a blank field, please complete this field if the condition applies.

City

Required, alphanumeric, 23 positions max.

Type the name of the enrollee's domestic or foreign city.

Note: If the address is an overseas military address, type FPO for fleet post office or APO for army post office in lieu of the city.

State

Conditional

Click the drop-down menu and select the enrollee's state, U.S. territory, or overseas military abbreviation. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory, And Overseas Military Abbreviations Table** in **Part 4**.

Note: If the address contains a state, U.S. territory, or overseas military abbreviation, this field is required; otherwise, do not complete this field.

ZIP

Conditional, alphanumeric, 11 positions max.

Type the enrollee's domestic ZIP Code or foreign postal code.

Note: If the State field is completed, a ZIP code must be entered. If the State field is not completed, this field is optional.

Country

Conditional

Click the drop-down menu and select the enrollee's country code. For a list and descriptions of country codes, see **Country Codes Table** in **Part 4**.

Note: If the State field is completed, do not complete this field. If the State field is not completed, and the address is from a country other than the United States, a country code must be entered.

SSN

Required, alphanumeric, 9 positions

Type the enrollee's social security number (SSN). If the enrollee does not want his/her SSN provided to the carrier, a pseudo SSN may be used if the pseudo SSN has been previously reported to the carrier.

Date of Birth

Required, alphanumeric, 8 positions

Type the enrollee's date of birth (MMDDYYYY).

Enrollment Code

Required, alphanumeric, 3 positions

Type the enrollment code, which consists of the plan and option codes.

Enrollment ID

►Conditional◄, alphanumeric, 9 positions

►If the annuitant is deceased, and the FEHB coverage is being transferred to a survivor, type the deceased annuitant's SSN; otherwise, do not complete this field.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◄

Effective Date

Required, alphanumeric, 8 positions

Type the date (MMDDYYYY) the requested action goes into effect.

Annuity Claim #

Optional, alphanumeric, 9 positions

Type the civil service annuitant (CSA) number assigned to the enrollee by OPM.

Survivor Annuity Claim #

Optional, alphanumeric, 9 positions

Type the civil service final (CSF) number assigned to the enrollee by OPM.

Report #

Optional, alphanumeric, ►7 positions max.◄

►Type the number of the original report (e.g., notification to carrier, transmittal number, etc.).◄

Form 2810 Add (Parts B thru F) Page Field Instructions

The Form 2810 Add (Parts B thru F) page (**Figure 2:70**) is used to create a Form 2810 (Parts B thru F) record to correct carrier enrollee records and resolve identified discrepancies. For instructions on using the Form 2810 Add (Parts B thru F) page, see **Adding A 2810 Record** in **Part 2**.

Note: You **must** select one of the parts (B through F).

Part B - Termination

Conditional

If the enrollment is terminated, click the radio button; otherwise, do not complete this field.

Part C - Transfer In

Conditional

If the enrollment is being transferred from one payroll office to another, click the radio button; otherwise, do not complete this field.

Part D - Reinstatement

Conditional

If the enrollment is being reinstated, click the radio button; otherwise, do not complete this field.

CLER Field Descriptions And Instructions

Part E - Change in Name of Enrollee

Conditional

If (1) an enrollee's name has changed, (2) the enrollment has changed from the enrollee's name to the name of the survivor annuitant, or (3) the enrollment has changed from the survivor annuitant's name to the name of another survivor annuitant, click the radio button; otherwise, do not complete this field.

Last Name

Conditional, alphanumeric, 25 positions max.

If the "Change In Name Of Enrollee" radio button is selected, type the enrollee's new last name or the last name of the new survivor annuitant, as applicable. If the individual has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

First Name

Conditional, alphanumeric, 17 positions max.

If the "Change In Name Of Enrollee" radio button is selected, type the enrollee's new first name or the first name of the new survivor annuitant, as applicable.

Initial

Conditional, alphanumeric, 1 position

If the "Change In Name Of Enrollee" radio button is selected, type the enrollee's new middle initial or the middle initial of the new survivor annuitant, as applicable.

▶**Note:** Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◀

Address Line 1

Conditional, alphanumeric, 35 positions max.

If the "Change In Name Of Enrollee" radio button is selected, and the first line of the street address for the enrollee or survivor annuitant is different than the address listed in Part A - Address Line 1, type the first line of the enrollee or survivor annuitant's new domestic or foreign street, apartment number, PO box, rural route, etc., as applicable

▶**Note:** Although the system allows for a blank field, please complete this field if the condition applies.◀

Address Line 2

Conditional, alphanumeric, 35 positions max.

If the "Change In Name Of Enrollee" radio button is selected, and the second line of the street address for the enrollee or survivor annuitant is different than the address listed in Part A - Address Line 2, type the second line of the enrollee or survivor annuitant's new domestic or foreign street, apartment number, PO box, rural route, etc., as applicable.

▶**Note:** Although the system allows for a blank field, please complete this field if the condition applies.◀

Address Line 3

Conditional, alphanumeric, 35 positions max.

If the “Change In Name Of Enrollee” radio button is selected, and the third line of the street address for the enrollee or survivor annuitant is different than the address listed in Part A - Address Line 3, type the third line of the enrollee or survivor annuitant’s new domestic or foreign street, apartment number, PO box, rural route, etc., as applicable.

►**Note:** Although the system allows for a blank field, please complete this field if the condition applies.◄

City

Conditional, alphanumeric, 23 positions max.

If the “Change In Name Of Enrollee” radio button is selected, and the domestic or foreign city for the enrollee or survivor annuitant’s address is different than the city listed in Part A - City, type the name of the new city for the enrollee or survivor annuitant’s address. If the address is an overseas military address, type FPO for fleet post office or APO for army post office in lieu of the city.

►**Note:** Although the system allows for a blank field, please complete this field if the condition applies.◄

State

Conditional

If the “Change In Name Of Enrollee” radio button is selected, and the state, U.S. territory, or overseas military abbreviation for the enrollee or survivor annuitant’s address is different than the state, U.S. territory, or overseas military abbreviation listed in Part A - State, click the drop-down menu and select the new state, U.S. territory, or overseas military abbreviation for the enrollee or survivor annuitant’s address. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory, And Overseas Military Abbreviations Table** in **Part 4**.

►**Note:** Although the system allows for a blank field, please complete this field if the condition applies.◄

ZIP

Conditional, alphanumeric, 11 positions max.

If (1) the “Change In Name Of Enrollee” radio button is selected, and (2) the ZIP Code or foreign postal code for the enrollee or survivor annuitant’s address is different than the ZIP Code or foreign postal code listed in Part A - ZIP, type the new ZIP Code or foreign postal code for the enrollee or survivor annuitant’s address.

►**Note:** Although the system allows for a blank field, please complete this field if the condition applies.◄

Country

Conditional

If (1) the “Change In Name Of Enrollee” radio button is selected, (2) the address is foreign, and (3) the country code for the enrollee or survivor annuitant’s address is different than the country code listed in Part A - Country Code, click the drop-down menu and select the new country code for the enrollee or survivor annuitant’s address. For a list and descriptions of country codes, see **Country Codes Table** in **Part 4**.

►**Note:** Although the system allows for a blank field, please complete this field if the condition applies.◄

Date of Birth

Conditional, alphanumeric, 8 positions

If the “Change In Name Of Enrollee” radio button is selected, type the enrollee or survivor annuitant’s date of birth (MMDDYYYY); otherwise, do not complete this field.

SSN

Conditional, alphanumeric, 9 positions

►If the “Change In Name Of Enrollee” radio button is selected, type the enrollee or survivor annuitant’s social security number (SSN). If the individual does not want his/her SSN provided to the carrier, a pseudo SSN may be used if the pseudo SSN has been reported to CLER. If the “Change In Name Of Enrollee” radio button is not selected, do not complete this field.◄

Sex

Conditional

If the “Change In Name Of Enrollee” radio button is selected, select the radio button next to one of the following values:

M	Indicates the enrollee or survivor annuitant is male.
F	Indicates the enrollee or survivor annuitant is female.

Part F- Change in Enrollment/Survivor Annuitant

Conditional

If the survivor annuitant’s enrollment code has changed, click the radio button; otherwise, do not complete this field.

New Enrollment Code Number

Conditional, alphanumeric, 3 positions

If the “Change In Enrollment/Survivor Annuitant” radio button is selected, type the new enrollment code for the survivor annuitant; otherwise, do not complete this field. The enrollment code consists of the plan and option codes for the survivor annuitant.

Form 2810 Add (Parts G and H) Page Field Instructions

The Form 2810 Add (Parts G and H) page (**Figure 2:71**) is used to create a Form 2810 (Parts G and H) record to correct carrier enrollee records and resolve identified discrepancies. For instructions on using the Form 2810 Add (Parts G and H) page, see **Adding A 2810 Record** in **Part 2**.

Remarks

Optional, alphanumeric, 400 positions max.

Type remarks regarding the creation of this record.

Date of Death

Conditional, alphanumeric, 8 positions

If the enrollee is deceased, type the enrollee's date of death (MMDDYYYY); otherwise, do not complete this field.

▶**Note:** Although the system allows for a blank field, please complete this field if the condition applies.◀

Agency Name

Required, alphanumeric, 35 positions max.

Type the name of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage.

Address Line 1

Required, alphanumeric, 35 positions max.

Type the first line of the domestic or foreign street, PO box, rural route, etc., of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage.

Address Line 2

▶Conditional◀, alphanumeric, 35 positions max.

▶If applicable, type the second line of the domestic or foreign street, PO box, rural route, etc., of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◀

Address Line 3

▶Conditional◀, alphanumeric, 35 positions max.

▶If applicable, type the third line of the domestic or foreign street, PO box, rural route, etc., of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee's FEHB coverage.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.◀

City

Required, alphanumeric, 23 positions max.

Type the name of the domestic or foreign city for the enrollee's employing, personnel, or point-of-contact office.

Note: If the address is an overseas military address, type FPO for fleet post office or APO for army post office in lieu of the city.

State

Conditional

Click the drop-down menu and select the state, U.S. territory, or overseas military abbreviation for the enrollee's employing, personnel, or point-of-contact office. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory, And Overseas Military Abbreviations Table** in **Part 4**.

Note: If the address contains a state, U.S. territory, or overseas military abbreviation, this field is required; otherwise, do not complete this field.

ZIP

Conditional, alphanumeric, 11 positions max.

Type the domestic ZIP Code or foreign postal code for the enrollee's employing, personnel, or point-of-contact office.

Note: If the State field is completed, a ZIP code must be entered. If the State field is not completed, this field is optional.

Country

Conditional

Click the drop-down menu and select the country code for the enrollee's employing, personnel, or point-of-contact office. For a list and descriptions of country codes, see **Country Codes Table** in **Part 4**.

Note: If the State field is completed, do not complete this field. If the State field is not completed, and the address is from a country other than the United States, a country code must be entered.

Agency ID

Optional, alphanumeric, 4 positions

Type the agency identification code of the enrollee's employing, personnel, or point-of-contact office (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

Personnel Office ID

▶*Required*◀*, alphanumeric, 4 positions*

Type the personnel office number for the enrollee's employing, personnel, or point-of-contact office.

▶**Note:** Although the system allows for a blank field, this field **must** be completed.◀

Agency Use

Optional, alphanumeric, 15 positions max.

Type information regarding this record.

Authorized Official

Last Name

Required, alphanumeric, 25 positions max.

Type the last name of the agency official who is authorized to sign the Form 2810. If the agency official has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

First Name

Optional, alphanumeric, 17 positions max.

▶Type the first name of the agency official who is authorized to sign the Form 2810.

Note: Although the system allows for a blank field, please complete this field if the data is available.◀

Initial

Optional, alphanumeric, 1 position

Type the middle initial of the agency official who is authorized to sign the Form 2810.

Note: Although the system allows for a blank field, please complete this field if the data is available.

Date

Required, alphanumeric, 8 positions

Type the date (MMDDYYYY) the authorized agency official signed the document.

Contact (Personnel)

Last Name

Conditional, alphanumeric, 25 positions max.

Type the personnel office contact’s last name. If the contact has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

Note: If the Last Name field under Contact (Payroll) is not completed, this field is required; otherwise, this field is optional.

First Name

Conditional, alphanumeric, 17 positions max.

If the Last Name field under Contact (Personnel) is completed, type the personnel office contact’s first name.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.

Initial

Conditional, alphanumeric, 1 position

If the Last Name field under Contact (Personnel) is completed, type the personnel office contact’s middle initial.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.

Phone

Conditional, numeric, 17 positions max.

If the Last Name field under Contact (Personnel) is completed, type the personnel office contact’s daytime area code and telephone number. **Do not** type alpha characters, spaces, dashes, parentheses, periods, etc.

Note: Although the system allows for a blank field, this field **must** be completed if the condition applies.

Contact (Payroll)

Last Name

Conditional, alphanumeric, 25 positions max.

Type the payroll office contact’s last name. If the contact has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III).

Note: If the Last Name field under Contact (Personnel) is not completed, this field is required; otherwise, this field is optional.

First Name

Conditional, alphanumeric, 17 positions max.

If the Last Name field under Contact (Payroll) is completed, type the payroll office contact's first name.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.

Initial

Conditional, alphanumeric, 1 position

If the Last Name field under Contact (Payroll) is completed, type the payroll office contact's middle initial.

Note: Although the system allows for a blank field, please complete this field if the condition applies and the data is available.

Phone

Conditional, numeric, 17 positions max.

If the Last Name field under Contact (Payroll) is completed, type the payroll office contact's daytime area code and telephone number. **Do not** type alpha characters, spaces, dashes, parentheses, periods, etc.

Note: Although the system allows for a blank field, this field **must** be completed if the condition applies.

Form 2810 Search Results Page Field Descriptions

The Form 2810 Search Results page (**Figure 2:72**) displays a list of Form 2810 records resulting from the search criteria entered on the Form 2810 page (**Figure 2:68**). For instructions on using the Form 2810 Search Results page, see **Maintaining 2810 Records** in **Part 2**.

Payroll Office ID

No entry

This field is system generated. This is the payroll office identification number.

Year

No entry

This field is system generated. This is the reconciliation year.

Quarter

No entry

This field is system generated. This is the reconciliation quarter.

Enrollee SSN

No entry

This field is system generated. This is the enrollee's social security number (SSN) or pseudo SSN.

Last Name

No entry

This field is system generated. This is the enrollee's last name.

First Name

No entry

This field is system generated. This is the enrollee's first name.

Release Date

No entry

This field is system generated. This is the date the record was released for processing.

Released By

No entry

This field is system generated. This is the user identification number of the individual who released the record for processing.

Status

No entry

This field is system generated. This is the status of the transmission. This field is populated by one of the following: Processed, Canceled, Released, or Not Released.

Form 2810 View (Part A) Page Field Descriptions

The Form 2810 View (Part A) page (**Figure 2:73**) displays a selected Form 2810 (Part A) record. For instructions on using the Form 2810 View (Part A) page, see **Viewing A 2810 Record** in **Part 2**.

Payroll Office ID

No entry

This field is system generated. This is the payroll office identification number.

Year

No entry

This field is system generated. This is the reconciliation year the 2810 form was created.

Quarter

No entry

This field is system generated. This is the reconciliation quarter the 2810 form was created.

Personnel Office ID

No entry

This field is system generated. This is the personnel office identifier code.

Last Name

No entry

This field is system generated. This is the enrollee's last name.

First Name	*No entry* This field is system generated. This is the enrollee's first name.
Initial	*No entry* This field is system generated. This is the enrollee's middle initial.
Address Line 1	*No entry* This field is system generated. This is the first line of the enrollee's domestic or foreign street, apartment number, PO box, rural route, etc.
Address Line 2	*No entry* This field is system generated. This is the second line of the enrollee's domestic or foreign street, apartment number, PO box, rural route, etc.
Address Line 3	*No entry* This field is system generated. This is the third line of the enrollee's domestic or foreign street, apartment number, PO box, rural route, etc.
City	*No entry* This field is system generated. This is the name of the enrollee's domestic or foreign city. **Note:** If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.
State	*No entry* This field is system generated. This is the enrollee's state, U.S. territory, or overseas military abbreviation. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory, And Overseas Military Abbreviations Table** in **Part 4**.
ZIP	*No entry* This field is system generated. This is the enrollee's domestic ZIP Code or foreign postal code.
Country	*No entry* This field is system generated. This is the enrollee's country code. For a list and descriptions of country codes, see **Country Codes Table** in **Part 4**.
SSN	*No entry* This field is system generated. ►This is the enrollee's social security number (SSN) or pseudo SSN.◄

Date of Birth

No entry

This field is system generated. This is the enrollee's date of birth (MMDDYYYY).

Enrollment Code

No entry

This field is system generated. This is the enrollment code, which consists of the plan and option codes.

Enrollment ID

No entry

This field is system generated. This is the deceased annuitant's SSN.

Effective Date

No entry

This field is system generated. This is the date (MMDDYYYY) the requested action goes into effect.

Annuity Claim #

No entry

This field is system generated. This is the civil service annuitant (CSA) number assigned to the enrollee by OPM.

Survivor Annuity Claim #

No entry

This field is system generated. This is the civil service final (CSF) number assigned to the enrollee by OPM.

Report #

No entry

This field is system generated. ►This is the number of the original report (e.g., notification to carrier, transmittal number, etc.).◄

Last Changed

ID

No entry

This field is system generated. This is the user identification number of the individual who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change.

Time

No entry

This field is system generated. This is the time of the most recent change.

Released

ID

No entry

This field is system generated. This is the user identification number of the individual who released the record for processing.

Date

No entry

This field is system generated. This is the date the record was released for processing.

Time

No entry

This field is system generated. This is the time the record was released for processing.

Processed

Date

No entry

This field is system generated. This is the date the record was processed.

Time

No entry

This field is system generated. This is the time the record was processed.

Form 2810 View (Parts B thru F) Page Field Descriptions

The Form 2810 View (Parts B thru F) page (**Figure 2:74**) displays a selected Form 2810 (Parts B thru F) record. For instructions on using the Form 2810 View (Parts B thru F) page, see **Viewing A 2810 Record** in **Part 2**.

Part B - Termination

No entry

This field is system generated. A selected radio button indicates the enrollment is terminated.

Part C - Transfer In

No entry

This field is system generated. A selected radio button indicates the enrollment is being transferred from one payroll office to another.

Part D - Reinstatement

No entry

This field is system generated. A selected radio button indicates the enrollment is being reinstated.

Part E - Change in Name of Enrollee

No entry

This field is system generated. A selected radio button indicates (1) an enrollee's name has changed, (2) the enrollment has changed from the enrollee's name to the name of the survivor annuitant, or (3) the enrollment has changed from the survivor annuitant's name to the name of another survivor annuitant.

Last Name

No entry

This field is system generated. This is the enrollee's new last name or the last name of the new survivor annuitant, as applicable.

First Name

No entry

This field is system generated. This is the enrollee's new first name or the first name of the new survivor annuitant, as applicable.

Initial

No entry

This field is system generated. This is the enrollee's new middle initial or the middle initial of the new survivor annuitant, as applicable.

Address Line 1

No entry

This field is system generated. This is the first line of the enrollee or survivor annuitant's new domestic or foreign street, apartment number, PO box, rural route, etc., as applicable.

Address Line 2

No entry

This field is system generated. This is the second line of the enrollee or survivor annuitant's new domestic or foreign street, apartment number, PO box, rural route, etc., as applicable.

Address Line 3

No entry

This field is system generated. This is the third line of the enrollee or survivor annuitant's new domestic or foreign street, apartment number, PO box, rural route, etc., as applicable.

City

No entry

This field is system generated. This is the new name of the city for the enrollee or survivor annuitant's address.

Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.

State

No entry

This field is system generated. This is the new state, U.S. territory, or overseas military abbreviation for the enrollee or survivor annuitant's address. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see State, U.S. Territory, And Overseas Military Abbreviations Table in **Part 4**.

ZIP

No entry

This field is system generated. This is the new ZIP Code or foreign postal code for the enrollee or survivor annuitant's address.

Country

No entry

This field is system generated. This is the new country code for the enrollee or survivor annuitant's address. For a list and descriptions of country codes, see **Country Codes Table** in **Part 4**.

Date of Birth

No entry

This field is system generated. This is the enrollee or survivor annuitant's date of birth (MMDDYYYY).

SSN

No entry

This field is system generated. ►This is the enrollee or survivor annuitant's social security number (SSN) or pseudo SSN.◄

Sex

No entry

The values listed below indicate the following:

M A selected radio button indicates the enrollee or survivor annuitant is male.

F A selected radio button indicates the enrollee or survivor annuitant is female.

Part F- Change in Enrollment/Survivor Annuitant

No entry

This field is system generated. A selected radio button indicates the survivor annuitant's enrollment code has changed.

New Enrollment Code Number

No entry

This field is system generated. This is the new enrollment code for the survivor annuitant.

Form 2810 View (Parts G and H) Page Field Descriptions

The Form 2810 View (Parts G and H) page (**Figure 2:75**) displays a selected Form 2810 (Parts G and H) record. For instructions on using the Form 2810 View (Parts G and H) page, see **Viewing A 2810 Record** in **Part 2**.

Remarks

No entry

This field is system generated. These are the remarks regarding the creation of this record.

Date of Death

No entry

This field is system generated. This is the enrollee's date of death (MMDDYYYY).

Agency Name

No entry

This field is system generated. This is the name of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee’s FEHB coverage.

Address Line 1

No entry

This field is system generated. This is the first line of the domestic or foreign street, PO box, rural route, etc., of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee’s FEHB coverage.

Address Line 2

No entry

This field is system generated. This is the second line of the domestic or foreign street, PO box, rural route, etc., of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee’s FEHB coverage.

Address Line 3

No entry

This field is system generated. This is the third line of the domestic or foreign street, PO box, rural route, etc., of the employing, personnel, or point-of-contact office that is responsible for coordinating the enrollee’s FEHB coverage.

City

No entry

This field is system generated. This is the name of the domestic or foreign city for the enrollee’s employing, personnel, or point-of-contact office.

Note: If the address is an overseas military address, this field displays FPO for fleet post office or APO for army post office in lieu of the city.

State

No entry

This field is system generated. This is the state, U.S. territory, or overseas military abbreviation for the enrollee’s employing, personnel, or point-of-contact office. For a list and descriptions of state, U.S. territory, and overseas military abbreviations, see **State, U.S. Territory, And Overseas Military Abbreviations Table** in **Part 4**.

ZIP

No entry

This field is system generated. This is the domestic ZIP Code or foreign postal code for the enrollee’s employing, personnel, or point-of-contact office.

Country

No entry

This field is system generated. This is the country code for the enrollee’s employing, personnel, or point-of-contact office. For a list and descriptions of country codes, see **Country Codes Table** in **Part 4**.

Agency ID

No entry

This field is system generated. This is the agency identification code of the enrollee’s employing, personnel, or point-of-contact office (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

Personnel Office ID

No entry

This field is system generated. This is the personnel office identification number for the enrollee's employing, personnel, or point-of-contact office.

Agency Use

No entry

This field is system generated. This is information regarding this record.

Authorized Official

Last Name

No entry

This field is system generated. This is the last name of the agency official who is authorized to sign the Form 2810.

First Name

No entry

This field is system generated. This is the first name of the agency official who is authorized to sign the Form 2810.

Initial

No entry

This field is system generated. This is the middle initial of the agency official who is authorized to sign the Form 2810.

Date

No entry

This field is system generated. This is the date the authorized agency official signed the document.

Contact (Personnel)

Last Name

No entry

This field is system generated. This is the personnel office contact's last name.

First Name

No entry

This field is system generated. This is the personnel office contact's first name.

Initial

No entry

This field is system generated. This is the personnel office contact's middle initial.

Phone

No entry

This field is system generated. This is the personnel office contact's daytime area code and telephone number.

Contact (Payroll)

Last Name

No entry

This field is system generated. This is the payroll office contact's last name.

First Name

No entry

This field is system generated. This is the payroll office contact's first name.

Initial

No entry

This field is system generated. This is the payroll office contact's middle initial.

Phone

No entry

This field is system generated. This is the payroll office contact's daytime area code and telephone number.

Form 2810 Update (Part A) Page Field Instructions

The Form 2810 Update (Part A) page (**Figure 2:76**) is used to update the data on a selected Form 2810 (Part A) record. For instructions on using the Form 2810 Update (Part A) page, see **Updating A 2810 Record** in **Part 2**. For field instructions, see **Form 2810 Add (Part A) Page Field Instructions** in **Part 3**.

Form 2810 Update (Parts B thru F) Page Field Instructions

The Form 2810 Update (Parts B thru F) page (**Figure 2:77**) is used to update the data on a selected Form 2810 (Parts B thru F) record. For instructions on using the Form 2810 Update (Parts B thru F) page, see **Updating A 2810 Record** in **Part 2**. For field instructions, see **Form 2810 Add (Parts B thru F) Page Field Instructions** in **Part 3**.

Form 2810 Update (Parts G and H) Page Field Instructions

The Form 2810 Update (Parts G and H) page (**Figure 2:78**) is used to update the data on a selected Form 2810 (Parts G and H) record. For instructions on using the Form 2810 Update (Parts G and H) page, see **Updating A 2810 Record** in **Part 2**. For field instructions, see **Form 2810 Add (Parts G and H) Page Field Instructions** in **Part 3**.

Transmission Field Descriptions And Instructions

This section presents the following topics:

Transmission Online Entry Page Field Instructions

The Transmission Online Entry page (**Figure 2:80**) is used to search for transmission online entry records by payroll office ID, year, etc. For instructions on using the Transmission Online Entry page, see **Maintaining Online Entry Records** in **Part 2**.

Payroll Office ID

Optional, alphanumeric, 8 positions

Type the payroll office identification number.

Year

Optional, alphanumeric, 4 positions

Type the reconciliation year.

Quarter

Optional, alphanumeric, 1 position

Type the reconciliation quarter.

Order By

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the ID sort option. To choose a sort option, select the radio button next to one of the following values:

`ID`	Sorts search results by payroll office ID.
`Year/Quarter`	Sorts search results by the entered reconciliation year and reconciliation quarter.

Transmission Online Entry Add Page Field Instructions

The Transmission Online Entry Add page (**Figure 2:81**) is used to add a transmission online entry record. For instructions on using the Transmission Online Entry Add page, see **Adding An Online Entry Record** in **Part 2**.

Payroll Office ID

Required

Click the drop-down menu and select the payroll office identification number.

Year

Optional default

Click the drop-down menu and select the reconciliation year. If no year is selected, this field automatically defaults to the current reconciliation year.

Quarter

Optional default

Click the drop-down menu and select the reconciliation quarter. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

As of Date

Required

This is the date the data was extracted from the payroll system. Click the first drop-down menu and select the month; click the second drop-down menu and select the day; and click the third drop-down menu and select the year.

Processing Code

Required

Click the drop-down menu and select the processing code used to process the file. The following are processing codes: Initial for initial file for the quarter; Add for add to existing enrollments; and Replace for replace all files and records that have been previously sent for this quarter.

Transmission Online Entries Search Results Page Field Descriptions

The Transmission Online Entries Search Results page (**Figure 2:82**) displays a list of transmission online entry records resulting from the search criteria entered on the Transmission Online Entry page (**Figure 2:80**). The Transmission Online Entries Search Results page also allows agencies to reuse the enrollment data from a previous quarter for the online transmission of enrollment data in the current quarter. For instructions on using the Transmission Online Entries Search Results page, see **Maintaining Online Entry Records** in **Part 2**.

Year

Optional, alphanumeric, 4 positions

Type the current reconciliation year. This field is completed only when the enrollment data from a previous quarter is reused for the online transmission of enrollment data in the current quarter.

Quarter

Optional, alphanumeric, 1 position

Type the current reconciliation quarter. This field is completed only when the enrollment data from a previous quarter is reused for the online transmission of enrollment data in the current quarter.

Select

Optional

Select the radio button next to the applicable previous quarter's enrollment data record. This field is completed only when the enrollment data from a previous quarter is reused for the online transmission of enrollment data in the current quarter.

ID

No entry

This field is system generated. This is the payroll office identification number.

Year

No entry

This field is system generated. This is the reconciliation year.

Qtr

No entry

This field is system generated. This is the reconciliation quarter.

Submission Date

No entry

This field is system generated. This is the date the transmission was submitted to CLER.

#

No entry

This field is system generated. This is the sequential transmission number.

Code

No entry

This field is system generated. This is the processing code. The Initial code indicates an initial file, the Add code indicates an additional file, and the Replace code indicates a replacement file.

Release Date

No entry

This field is system generated. This is the date the transmission was released to CLER for processing.

Status

No entry

This field is system generated. This is the status of the transmission. This field is populated by one of the following: Processed, Canceled, Released, or Not Released.

Records

No entry

This field is system generated. This is the number of records contained in the transmission.

Transmission Online Entry View Page Field Descriptions

The Transmission Online Entry View page (**Figure 2:83**) displays a selected transmission online entry record. For instructions on using the Transmission Online Entry View page, see **Viewing An Online Entry Record** in **Part 2**.

Payroll Office ID

No entry

This field is system generated. This is the payroll office identification number.

Year

No entry

This field is system generated. This is the reconciliation year.

Quarter

No entry

This field is system generated. This is the reconciliation quarter.

As of Date

No entry

This field is system generated. This is the date (MMDDYYYY) the data was extracted from the payroll system.

Processing Code

No entry

This field is system generated. This is the processing code. The following are processing codes: Initial for initial file for the quarter; Add for add to existing enrollments; and Replace for replace all files and records that have been previously sent for this quarter.

Submission

No entry

This field is system generated. This is the submission number for the reconciliation year/quarter.

Status

No entry

This field is system generated. This is the transmission status (R = Released, C = Cancelled, P = Processed).

Last Changed

ID

No entry

This field is system generated. This is the user identification number of the individual who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change.

Time

No entry

This field is system generated. This is the time of the most recent change.

Transmission Online Entry Enrollees Add Page Field Instructions

The Transmission Online Entry Enrollees Add page (**Figure 2:87**) is used to add enrollee records for submission to the CLER reconciliation process. For instructions on using the Transmission Online Entry Enrollees Add page, see **Adding An Online Entry Enrollee Record** in **Part 2**.

Payroll Office ID

No entry

This field is system generated. This is the payroll office identification number.

Year

No entry

This field is system generated. This is the reconciliation year.

Quarter

No entry

This field is system generated. This is the reconciliation quarter.

Agency

Required, alphanumeric, 4 positions

Type the agency identification code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

POI

Required, alphanumeric, 4 positions

Type the personnel office identifier of the office where the enrollee's records are maintained.

Enrollment Code

Required, alphanumeric, 3 positions

Type the enrollment code.

SSN

Required, alphanumeric, 9 positions

Type the enrollee's social security number (SSN). If the enrollee does not want his/her SSN provided to the carrier, a pseudo SSN may be used.

Last Name

Required, alphanumeric, 25 positions max.

Type the enrollee's last name. If the enrollee has a title (e.g., Jr, Sr, I, II, or III), it should be entered after the last name without punctuation (e.g., Smith Jr or Smith III). If there is a case of an enrollee having only one name, that one name must be entered in this field.

First Name

Required, alphanumeric, 12 positions max.

Type the enrollee's first name.

Middle Name

Optional, alphanumeric, 12 positions max.

Type the enrollee's middle name or initial.

Effective Date

Optional

This is the date the requested action goes into effect. To select this date, click the first drop-down menu and select the month; click the second drop-down menu and select the day; and click the third drop-down menu and select the year.

Amount

Optional, numeric, 6 positions max.

Type the withholding/premium amount reported for the pay period extraction date.

Deceased Annuitant SSN

Optional, alphanumeric, 9 positions max.

Type the deceased annuitant enrollee's social security number.

Pseudo SSN

Optional, alphanumeric, 9 positions max.

Type the pseudo social security number used by the agency and carrier to identify the enrollee.

Other Payroll ID

Optional, alphanumeric, 15 positions max.

Type the identifier used by the agency to identify the enrollee.

Other Carrier ID

Optional, alphanumeric, 15 positions max.

Type the identifier used by the carrier to identify the enrollee.

Submitter Use #1

Optional, alphanumeric, 20 positions max.

Type remarks regarding the creation of this record.

Submitter Use #2

Optional, alphanumeric, 20 positions max.

Type remarks regarding the creation of this record.

Submitter Use #3

Optional, alphanumeric, 20 positions max.

Type remarks regarding the creation of this record.

Transmission Online Entry Enrollees Search Results Page Field Descriptions

The Transmission Online Entry Enrollees Search Results page (**Figure 2:84**) displays a list of transmission online entry enrollee records contained within a transmission file. This page is displayed after the **[List]** button on the Transmission Online Entries Search Results page (**Figure 2:82**) is clicked. For instructions on using the Transmission Online Entry Enrollees Search Results page, see **Viewing An Online Entry Enrollee Record** in **Part 2**.

ID

No entry

This field is system generated. This is the payroll office identification number.

Year

No entry

This field is system generated. This is the reconciliation year.

Qtr

No entry

This field is system generated. This is the reconciliation quarter.

Enrollee SSN

No entry

This field is system generated. This is the enrollee's social security number (SSN).

Last Name

No entry

This field is system generated. This is the enrollee's last name.

First Name

No entry

This field is system generated. This is the enrollee's first name.

Code

No entry

This field is system generated. This is the carrier enrollment code.

Agency

No entry

This field is system generated. This is the agency identification code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

POI

No entry

This field is system generated. This is the personnel office identifier of the office where the enrollee's records are maintained.

Transmission Online Entry Enrollees View Page Field Descriptions

The Transmission Online Entry Enrollees View page (**Figure 2:85**) displays a selected transmission online entry enrollee record. For instructions on using the Transmission Online Entry Enrollees View page, see **Viewing An Online Entry Enrollee Record** in **Part 2**.

Payroll Office ID

No entry

This field is system generated. This is the payroll office identification number.

Year

No entry

This field is system generated. This is the reconciliation year.

Quarter

No entry

This field is system generated. This is the reconciliation quarter.

Agency

No entry

This field is system generated. This is the agency identification code of the office where the enrollee is employed (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

POI

No entry

This field is system generated. This is the personnel office identifier of the office where the enrollee's records are maintained.

Enrollment Code

No entry

This field is system generated. This is the carrier enrollment code.

SSN

No entry

This field is system generated. This is the enrollee's social security number (SSN).

Last Name

No entry

This field is system generated. This is the enrollee's last name.

First Name

No entry

This field is system generated. This is the enrollee's first name.

Middle Name

No entry

This field is system generated. This is the enrollee's middle name or initial.

Effective Date

No entry

This field is system generated. This is the date (MMDDYYYY) the requested action goes into effect.

Amount

No entry

This field is system generated. This is the withholding/premium amount reported for the pay period extraction date.

Deceased Annuitant SSN

No entry

This field is system generated. This is the deceased annuitant enrollee's social security number.

Pseudo SSN

No entry

This field is system generated. This is the pseudo social security number used by the agency and carrier to identify the enrollee.

Other Payroll ID

No entry

This field is system generated. This is an identifier used by the agency to identify the enrollee.

Other Carrier ID

No entry

This field is system generated. This is an identifier used by the carrier to identify the enrollee.

Submitter Use #1

No entry

This field is system generated. These are remarks regarding the creation of this record.

Submitter Use #2

No entry

This field is system generated. These are remarks regarding the creation of this record.

Submitter Use #3

No entry

This field is system generated. These are remarks regarding the creation of this record.

Last Changed

ID

No entry

This field is system generated. This is the user identification number of the individual who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change.

Time

No entry

This field is system generated. This is the time of the most recent change.

Transmission Online Entry Enrollees Update Page Field Instructions

The Transmission Online Entry Enrollees Update page (**Figure 2:86**) is used to update the data on a selected transmission online entry enrollee record. For instructions on using the Transmission Online Entry Enrollees Update page, see **Updating An Online Entry Enrollee Record** in **Part 2**. For field instructions, see **Transmission Online Entry Enrollees Add Page Field Instructions** in **Part 3**.

Transmission Online Entry Update Page Field Instructions

The Transmission Online Entry Update page (**Figure 2:88**) is used to update the data on a selected transmission online entry record. For instructions on using the Transmission Online Entry Update page, see **Updating An Online Entry Record** in **Part 2**. For field instructions, see **Transmission Online Entry Add Page Field Instructions** in **Part 3**.

Reports Field Descriptions And Instructions

This section presents the following topics:

►Payroll Discrepancy Listing (Report 1) Page Field Instructions

The Payroll Discrepancy Listing page (**Figure 2:90**) is used to produce the Payroll Discrepancy Listing report (**Figure 2:91**). This report provides a listing by payroll office identification number of payroll office and carrier enrollee records that match, as well as records marked with payroll office warning and discrepancy codes. For instructions on using the Payroll Discrepancy Listing page, see **Viewing Payroll Discrepancy Listing (Report 1)** in **Part 2.**◄

Note: Entry of at least two optional fields (e.g., Agency, Personnel Office ID, etc.) is required to produce a report, unless you complete the **entire** SSN or Other ID field, in which case, no other entries are needed.

Payroll Office ID

►*Optional default*◄

►Click the drop-down menu and select your organization's payroll office identification number. If no number is selected, this field automatically defaults to your organization's payroll office identification number.◄

Year

Optional default

Click the drop-down menu and select the reconciliation year. If no year is selected, this field automatically defaults to the current reconciliation year.

Quarter

Optional default

Click the drop-down menu and select the reconciliation quarter. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

Fail Count

To search for enrollee records by a specific fail count number or a range of fail count numbers, complete the fields as described below.

From

Optional, numeric, 3 positions max.

To search for enrollee records by a specific fail count number, type the number, then go to the To field.

To search for enrollee records by a range of fail count numbers, type the number that starts the range, then go to the To field.

To

Optional, numeric, 3 positions max.

To search for enrollee records by a specific fail count number, type the number that was typed in the From field.

To search for enrollee records by a range of fail count numbers, type the number that ends the range.

SSN

To search for a specific enrollee record by social security number (SSN), or to search for a range of enrollee records by a range of SSNs, complete the fields as described below.

Note: A search for enrollee records by **complete** enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency, Personnel Office ID, etc.) on this page.

From

Optional, numeric, 9 positions max.

To search for a specific enrollee record by SSN, type the SSN and skip the To field.

To search for a range of enrollee records by a range of SSNs, type the SSN that starts the range, then go to the To field.

To

Optional, numeric, 9 positions max.

When searching for a range of enrollee records by a range of SSNs, type the SSN that ends the range; otherwise, leave blank.

Other ID

These fields are used by the Retirement Services Program (RSP) and Office of Workers' Compensation Programs (OWCP). RSP personnel use these fields to search for enrollee records by civil service annuitant (CSA) or civil service final (CSF) identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.

Note: A search for enrollee records by **complete** Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency, Personnel Office ID, etc.) on this page.

From

Optional, alphanumeric, 15 positions max.

To search for a specific enrollee record by Other ID, type the Other ID and skip the To field.

To search for a range of enrollee records by a range of Other IDs, type the Other ID that starts the range, then go to the To field.

Note for RSP: Type the CSA or CSF identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXXX, and the CSF identifier is typed as FXXXXXXXX.

To

Optional, alphanumeric, 15 positions max.

When searching for a range of enrollee records by a range of Other IDs, type the Other ID that ends the range; otherwise, leave blank.

Agency

Optional, alphanumeric, 4 positions

Type the agency identification code (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

Personnel Office ID

Optional, alphanumeric, 4 positions

Type the personnel office identification number.

Carrier

Optional

Click the drop-down menu and select the carrier code.

Enrollment Code

Optional

Click the drop-down menu and select the enrollment code.

Error Code

Optional

Click the drop-down menu and select the error code. For a list and descriptions of these codes, see **Discrepancy Codes Table** in **Part 4**.

Warning Code

Optional

Click the drop-down menu and select the warning code. For a list and descriptions of these codes, see **Warning Codes Table** in **Part 4.**

Discrepancies

Optional default

This field allows users to display search results by the options listed below. If no display option is selected, this field automatically defaults to the All option. To choose a display option, select the radio button next to one of the following values:

All	Displays all records related to the search criteria.
Unreconciled	Displays all records with unreconciled discrepancies related to the search criteria.
Errors	Displays all records with errors related to the search criteria.
Warnings	Displays all records with warnings related to the search criteria.
Reconciled	Displays all records with reconciled discrepancies related to the search criteria.
None	Displays all records with no discrepancies related to the search criteria.
Not Validated	Displays records related to the search criteria that have not been validated.

Order By

1st

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the Name option. To choose a sort option, click the drop-down menu and select one of the following options to display the selected criteria in first sort search order:

Agency	Sorts search results by agency code.
Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
Pers. Office ID	Sorts search results by personnel office identification number.
SSNO	Sorts search results by enrollee social security number.
Other ID	Sorts search results by the identifier used by RSP/OWCP to identify the enrollee.

2nd

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the SSNO option. To choose a sort option, click the drop-down menu and select one of the following options to display the selected criteria in second sort search order:

CLER Field Descriptions And Instructions

Agency	Sorts search results by agency code.
Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
Pers. Office ID	Sorts search results by personnel office identification number.
SSNO	Sorts search results by enrollee social security number.
Other ID	Sorts search results by the identifier used by RSP/OWCP to identify the enrollee.

3rd

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in third sort search order:

Agency	Sorts search results by agency code.
Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
Pers. Office ID	Sorts search results by personnel office identification number.
SSNO	Sorts search results by enrollee social security number.
Other ID	Sorts search results by the identifier used by RSP/OWCP to identify the enrollee.

4th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in fourth sort search order:

Agency	Sorts search results by agency code.
Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
Pers. Office ID	Sorts search results by personnel office identification number.
SSNO	Sorts search results by enrollee social security number.
Other ID	Sorts search results by the identifier used by RSP/OWCP to identify the enrollee.

5th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in fifth sort search order:

`Agency`	Sorts search results by agency code.
`Enrollment Code`	Sorts search results by enrollment code.
`Fail Count`	Sorts search results by the number of times a record has failed the quarterly edit process.
`Name`	Sorts search results by enrollee name.
`Pers. Office ID`	Sorts search results by personnel office identification number.
`SSNO`	Sorts search results by enrollee social security number.
`Other ID`	Sorts search results by the identifier used by RSP/OWCP to identify the enrollee.

6th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in sixth sort search order:

`Agency`	Sorts search results by agency code.
`Enrollment Code`	Sorts search results by enrollment code.
`Fail Count`	Sorts search results by the number of times a record has failed the quarterly edit process.
`Name`	Sorts search results by enrollee name.
`Pers. Office ID`	Sorts search results by personnel office identification number.
`SSNO`	Sorts search results by enrollee social security number.
`Other ID`	Sorts search results by the identifier used by RSP/OWCP to identify the enrollee.

►Check box to create report without totals

Optional

Select this check box to omit totals from the report.◄

►Payroll Discrepancy Listing (Report 1) Field Descriptions

The Payroll Discrepancy Listing report (**Figure 2:91**) displays a listing by payroll office identification number of payroll office and carrier enrollee records that match, as well as records marked with payroll office warning and discrepancy codes. For instructions on viewing the Payroll Discrepancy Listing report, see **Viewing Payroll Discrepancy Listing (Report 1)** in **Part 2**.◄

Payroll Office

Other ID

No entry

This field is system generated. This field is used by the Retirement Services Program (RSP) and the Office of Workers' Compensation Programs (OWCP). RSP personnel use this field to reference an enrollee's civil service annuitant or civil service final identifier. OWCP personnel use this field to reference an enrollee's claim identifier.

Note: The Agency and POI fields are displayed in lieu of this field when a payroll office identification number other than **24900002**, **24900003**, or **160099XX** is entered in the Payroll Office ID field on the Payroll Discrepancy Listing page.

SSN

No entry

This field is system generated. This is the enrollee's social security number submitted by the payroll office.

Name

No entry

This field is system generated. This is the enrollee's name submitted by the payroll office.

Code

No entry

This field is system generated. This is the enrollment code submitted by the payroll office.

Eff. Date

No entry

This field is system generated. This is the enrollment effective date (MM/DD/YYYY) submitted by the payroll office.

Whld Amt

No entry

This field is system generated. This is the enrollee's withholding amount submitted by the payroll office.

Agency

No entry

This field is system generated. This is the agency identification code. This code consists of the department code and agency code.

Note: The Other ID field is displayed in lieu of this field when **24900002**, **24900003**, or **160099XX** is entered in the Payroll Office ID field on the Payroll Discrepancy Listing page.

POI

No entry

This field is system generated. This is the personnel office identification number.

Note: The Other ID field is displayed in lieu of this field when **24900002**, **24900003**, or **160099XX** is entered in the Payroll Office ID field on the Payroll Discrepancy Listing page.

Carrier

Name

No entry

This field is system generated. This is the enrollee's name submitted by the carrier.

Code

No entry

This field is system generated. This is the enrollment code submitted by the carrier.

Eff. Date

No entry

This field is system generated. This is the enrollment effective date (MM/DD/YYYY) submitted by the carrier.

Discrepancy

No entry

This field is system generated. This is the error or warning code generated by CLER. For lists and descriptions of error and warning codes, see **Discrepancy Codes Table** and **Warning Codes Table** in **Part 4**.

Fail Count

No entry

This field is system generated. This is the number of times the initial discrepancy has been identified and reported.

Errors

No entry

This field is system generated. This is the sum of error codes displayed in the Discrepancy field.

►**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◄

Warnings

No entry

This field is system generated. This is the sum of warning codes displayed in the Discrepancy field.

►**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◄

Total Records

No entry

This field is system generated. This is the total number of enrollee records displayed on the report.

▶**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◀

Discrepancy Summary (Report 2) Page Field Instructions

The Discrepancy Summary page (**Figure 2:93**) is used to produce the Discrepancy Summary report (**Figure 2:94**). This report compares the number of enrollee records with discrepancies occurring in one quarter to those that occurred in any other quarter. For instructions on using the Discrepancy Summary page, see **Viewing Discrepancy Summary (Report 2)** in **Part 2**.

Year

From

Optional default

Click the drop-down menu and select the year that begins the range of reconciliation years. If no year is selected, this field automatically defaults to the current reconciliation year.

To

Optional default

Click the drop-down menu and select the year that ends the range of reconciliation years. If no year is selected, this field automatically defaults to the current reconciliation year.

Quarter

From

Optional default

Click the drop-down menu and select the quarter that begins the range of reconciliation quarters. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

To

Optional default

Click the drop-down menu and select the quarter that ends the range of reconciliation quarters. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

Payroll Office ID

Required

Click the drop-down menu and select the payroll identification number.

Carrier

Optional

Click the drop-down menu and select the carrier code.

Enrollment Code

Optional

Click the drop-down menu and select the enrollment code.

Fail Count

To search for enrollee records by a specific fail count number or a range of fail count numbers, complete the fields as described below.

From

Optional, numeric, 3 positions max.

To search for enrollee records by a specific fail count number, type the number, then go to the To field.

To search for enrollee records by a range of fail count numbers, type the number that starts the range, then go to the To field.

To

Optional, numeric, 3 positions max.

To search for enrollee records by a specific fail count number, type the number that was typed in the From field.

To search for enrollee records by a range of fail count numbers, type the number that ends the range.

Discrepancy Summary (Report 2) Field Descriptions

The Discrepancy Summary report (**Figure 2:94**) compares the number of enrollee records with discrepancies occurring in one quarter to those that occurred in any other quarter. For instructions on viewing the Discrepancy Summary report, see **Viewing Discrepancy Summary (Report 2)** in **Part 2**.

Payroll Office

No entry

This field is system generated. This is the payroll office identification number.

Year/Quarter

From

No entry

This field is system generated. This is the reconciliation year/quarter that begins the range of reconciliation years/quarters.

To

No entry

This field is system generated. This is the reconciliation year/quarter that ends the range of reconciliation years/quarters.

Change

Actual

No entry

This field is system generated. This number indicates the actual changes in values between prior and current reconciliation years/quarters.

Percent

No entry

This field is system generated. This is the percent changes in values between prior and current reconciliation years/quarters.

Total Enrollee Records

No entry

This field is system generated. This is the total number of enrollee records that meet the search criteria entered on the Discrepancy Summary page.

Total Matches Found

No entry

This field is system generated. This is the total number of matched (no discrepancies) enrollee records.

Total Discrepancies Found

No entry

This field is system generated. This is the total number of enrollee records with discrepancies.

Total Discrepancies Reconciled

No entry

This field is system generated. This is the total number of reconciled enrollee records.

Percent Discrepancies Reconciled

No entry

This field is system generated. This is the percentage of enrollee records reconciled to total discrepancies.

Payroll Office Reconciliation (Report 3) Page Field Instructions

The Payroll Office Reconciliation page (**Figure 2:95**) is used to produce the Payroll Office Reconciliation report (**Figure 2:96**). This report lists each enrollee record that has a discrepancy and whether that discrepancy has been reconciled. For instructions on using the Payroll Office Reconciliation page, see **Viewing Payroll Office Reconciliation (Report 3)** in **Part 2**.

Note: Entry of at least two optional fields (e.g., Agency, Personnel Office ID, etc.) is required to produce a report, unless you complete the **entire** SSN or Other ID field, in which case, no other entries are needed.

Payroll Office ID

Required

Click the drop-down menu and select the payroll office identification number.

Year

Optional default

Click the drop-down menu and select the reconciliation year. If no year is selected, this field automatically defaults to the current reconciliation year.

Quarter

Optional default

Click the drop-down menu and select the reconciliation quarter. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

Fail Count

To search for enrollee records by a specific fail count number or a range of fail count numbers, complete the fields as described below.

From

Optional, numeric, 3 positions max.

To search for enrollee records by a specific fail count number, type the number, then go to the To field.

To search for enrollee records by a range of fail count numbers, type the number that starts the range, then go to the To field.

To

Optional, numeric, 3 positions max.

To search for enrollee records by a specific fail count number, type the number that was typed in the From field.

To search for enrollee records by a range of fail count numbers, type the number that ends the range.

Reconciliation Date

From

Optional

This is the date that begins the range of reconciliation dates. To select this date, click the first drop-down menu and select the month; click the second drop-down menu and select the day; and click the third drop-down menu and select the year.

To

Optional

This is the date that ends the range of reconciliation dates. To select this date, click the first drop-down menu and select the month; click the second drop-down menu and select the day; and click the third drop-down menu and select the year.

SSN

To search for a specific enrollee record by social security number (SSN), or to search for a range of enrollee records by a range of SSNs, complete the fields as described below.

Note: A search for enrollee records by **complete** enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Agency, Personnel Office ID, etc.) on this page.

From

Optional, numeric, 9 positions max.

To search for a specific enrollee record by SSN, type the SSN and skip the To field.

To search for a range of enrollee records by a range of SSNs, type the SSN that starts the range, then go to the To field.

To

Optional, numeric, 9 positions max.

When searching for a range of enrollee records by a range of SSNs, type the SSN that ends the range; otherwise, leave blank.

Agency

Optional, alphanumeric, 4 positions

Type the agency identification code (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

Personnel Office ID

Optional, alphanumeric, 4 positions

Type the personnel office identification number.

Carrier

Optional

Click the drop-down menu and select the carrier code.

Enrollment Code

Optional

Click the drop-down menu and select the enrollment code.

User ID

Optional, alphanumeric, 8 positions max.

Type the user identification number of the person creating the report.

Other ID

These fields are used by the Retirement Services Program (RSP) and Office of Workers' Compensation Programs (OWCP). RSP personnel use these fields to search for enrollee records by civil service annuitant (CSA) or civil service final (CSF) identifier. OWCP personnel use these fields to search for enrollee records by claim identifier. To search for enrollee records using these fields, follow the instructions below.

Note: A search for enrollee records by **complete** Other IDs will display the records without the need to complete another optional data entry field (e.g., Agency, Personnel Office ID, etc.) on this page.

From

Optional, alphanumeric, 15 positions max.

To search for a specific enrollee record by Other ID, type the Other ID and skip the To field.

To search for a range of enrollee records by a range of Other IDs, type the Other ID that starts the range, then go to the To field.

Note for RSP: Type the CSA or CSF identifier without the first two characters (i.e., CS). For example, the CSA identifier is typed as AXXXXXXXX, and the CSF identifier is typed as FXXXXXXXX.

To

Optional, alphanumeric, 15 positions max.

When searching for a range of enrollee records by a range of Other IDs, type the Other ID that ends the range; otherwise, leave blank.

Order By

1st

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the Name option. To choose a sort option, click the drop-down menu and select one of the following options to display the selected criteria in first sort search order:

Agency	Sorts search results by agency code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
Pers. Office ID	Sorts search results by personnel office identification number.
Reconciliation Date	Sorts search results by reconciliation date.
SSNO	Sorts search results by enrollee social security number.
Other ID	Sorts search results by the identifier used by RSP/OWCP to identify the enrollee.
User ID	Sorts search results by user identification number.

2nd

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in second sort search order:

Agency	Sorts search results by agency code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.

Pers. Office ID	Sorts search results by personnel office identification number.
Reconciliation Date	Sorts search results by reconciliation date.
SSNO	Sorts search results by enrollee social security number.
Other ID	Sorts search results by the identifier used by RSP/OWCP to identify the enrollee.
User ID	Sorts search results by user identification number.

3rd

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in third sort search order:

Agency	Sorts search results by agency code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
Pers. Office ID	Sorts search results by personnel office identification number.
Reconciliation Date	Sorts search results by reconciliation date.
SSNO	Sorts search results by enrollee social security number.
Other ID	Sorts search results by the identifier used by RSP/OWCP to identify the enrollee.
User ID	Sorts search results by user identification number.

4th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in fourth sort search order:

Agency	Sorts search results by agency code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
Pers. Office ID	Sorts search results by personnel office identification number.
Reconciliation Date	Sorts search results by reconciliation date.
SSNO	Sorts search results by enrollee social security number.
Other ID	Sorts search results by the identifier used by RSP/OWCP to identify the enrollee.
User ID	Sorts search results by user identification number.

5th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in fifth sort search order:

Agency	Sorts search results by agency code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
Pers. Office ID	Sorts search results by personnel office identification number.
Reconciliation Date	Sorts search results by reconciliation date.
SSNO	Sorts search results by enrollee social security number.
Other ID	Sorts search results by the identifier used by RSP/OWCP to identify the enrollee.
User ID	Sorts search results by user identification number.

6th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in sixth sort search order:

Agency	Sorts search results by agency code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
Pers. Office ID	Sorts search results by personnel office identification number.
Reconciliation Date	Sorts search results by reconciliation date.
SSNO	Sorts search results by enrollee social security number.
Other ID	Sorts search results by the identifier used by RSP/OWCP to identify the enrollee.
User ID	Sorts search results by user identification number.

►Check box to create report without totals

Optional

Select this check box to omit totals from the report.◄

Payroll Office Reconciliation (Report 3) Field Descriptions

The Payroll Office Reconciliation report (**Figure 2:96**) lists each enrollee record that has a discrepancy and whether that discrepancy has been reconciled. For instructions on viewing the Payroll Office Reconciliation report, see **Viewing Payroll Office Reconciliation (Report 3)** in **Part 2**.

Other ID

No entry

This field is system generated. This field is used by the Retirement Services Program (RSP) and Office of Workers' Compensation Programs (OWCP). RSP personnel use this field to reference an enrollee's civil service annuitant or civil service final identifier. OWCP personnel use this field to reference an enrollee's claim identifier.

Note: The Agency and POI fields are displayed in lieu of this field when a payroll office identification number other than **24900002**, **24900003**, or **160099XX** is entered in the Payroll Office ID field on the Payroll Office Reconciliation page.

SSN

No entry

This field is system generated. This is the enrollee's social security number.

Name

No entry

This field is system generated. This is the enrollee's name.

Carrier

No entry

This field is system generated. This is the carrier identification code.

Agency

No entry

This field is system generated. This is the agency identification code. This code consists of the department code and agency code.

Note: The Other ID field is displayed in lieu of this field when **24900002**, **24900003**, or **160099XX** is entered in the Payroll Office ID field on the Payroll Office Reconciliation page.

POI

No entry

This field is system generated. This is the personnel office identification number.

Note: The Other ID field is displayed in lieu of this field when **24900002**, **24900003**, or **160099XX** is entered in the Payroll Office ID field on the Payroll Office Reconciliation page.

Code

No entry

This field is system generated. This is the enrollment code.

Reconciliation

Reason

No entry

This field is system generated. This is the reconciliation reason code. For a list and descriptions of reconciliation reason codes, see **Reconciliation Reason Codes Table** in **Part 4**.

Date

No entry

This field is system generated. This is the reconciliation date.

User ID

No entry

This field is system generated. This is the user identification number of the person who entered the reconciliation reason code.

Action

No entry

This field is system generated. This is the reconciliation action code. For a list and descriptions of reconciliation action codes, see **Reconciliation Action Codes Table** in **Part 4**.

Fail Count

No entry

This field is system generated. This is the number of times the initial discrepancy has been identified.

With Errors

No entry

This field is system generated. This is the sum of enrollee records with codes displayed in the Reason and Action fields.

►**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◄

Without Errors

No entry

This field is system generated. This is the sum of enrollee records with no codes displayed in the Reason and Action fields.

►**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◄

Total Records

No entry

This field is system generated. This is the sum of enrollee records displayed on the report.

►**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◄

Carrier Reconciliation (Report 4) Page Field Instructions

The Carrier Reconciliation page (**Figure 2:98**) is used to produce the Carrier Reconciliation report (**Figure 2:99**). This report lists each enrollee that has a discrepancy the payroll office has determined to be a problem with the carrier's records. For instructions on using the Carrier Reconciliation page, see **Viewing Carrier Reconciliation (Report 4)** in **Part 2**.

Note: Entry of at least two optional fields (e.g., Payroll Office ID, Enrollment Code, etc.) is required to produce a report, unless you complete the **entire** SSN field, in which case, no other entries are needed.

Carrier ID

Required

Click the drop-down menu and select the carrier identification number.

Year

Optional default

Click the drop-down menu and select the reconciliation year. If no year is selected, this field automatically defaults to the current reconciliation year.

Quarter

Optional default

Click the drop-down menu and select the reconciliation quarter. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

Reconciliation Date

From

Optional

This is the date that begins the range of reconciliation dates. To select this date, click the first drop-down menu and select the month; click the second drop-down menu and select the day; and click the third drop-down menu and select the year.

To

Optional

This is the date that ends the range of reconciliation dates. To select this date, click the first drop-down menu and select the month; click the second drop-down menu and select the day; and click the third drop-down menu and select the year.

SSN

To search for a specific enrollee record by social security number (SSN), or to search for a range of enrollee records by a range of SSNs, complete the fields as described below.

Note: A search for enrollee records by **complete** enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Payroll Office ID, Enrollment Code, etc.) on this page.

From

Optional, numeric, 9 positions max.

To search for a specific enrollee record by SSN, type the SSN and skip the To field.

To search for a range of enrollee records by a range of SSNs, type the SSN that starts the range, then go to the To field.

To

Optional, numeric, 9 positions max.

When searching for a range of enrollee records by a range of SSNs, type the SSN that ends the range; otherwise, leave blank.

Payroll Office ID

Optional

Click the drop-down menu and select the payroll office identification number.

Enrollment Code

Optional

Click the drop-down menu and select the enrollment code.

User ID

Optional, alphanumeric, 8 positions max.

Type the user identification number of the person creating the report.

Order By

1st

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the Name option. To choose a sort option, click the drop-down menu and select one of the following options to display the selected criteria in first sort search order:

Enrollment Code	Sorts search results by enrollment code.
Name	Sorts search results by enrollee name.
SSNO	Sorts search results by enrollee social security number.

2nd

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in second sort search order:

Enrollment Code	Sorts search results by enrollment code.
Name	Sorts search results by enrollee name.
SSNO	Sorts search results by enrollee social security number.

3rd

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in third sort search order:

	`Enrollment Code`	Sorts search results by enrollment code.
	`Name`	Sorts search results by enrollee name.
	`SSNO`	Sorts search results by enrollee social security number.

4th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in fourth sort search order:

`Enrollment Code`	Sorts search results by enrollment code.
`Name`	Sorts search results by enrollee name.
`SSNO`	Sorts search results by enrollee social security number.

5th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in fifth sort search order:

`Enrollment Code`	Sorts search results by enrollment code.
`Name`	Sorts search results by enrollee name.
`SSNO`	Sorts search results by enrollee social security number.

6th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in sixth sort search order:

`Enrollment Code`	Sorts search results by enrollment code.
`Name`	Sorts search results by enrollee name.
`SSNO`	Sorts search results by enrollee social security number.

►Check box to create report without totals

Optional

Select this check box to omit totals from the report.◄

Carrier Reconciliation (Report 4) Field Descriptions

The Carrier Reconciliation report (**Figure 2:99**) lists each enrollee that has a discrepancy the payroll office has determined to be a problem with the carrier's records. For instructions on viewing the Carrier Reconciliation report, see **Viewing Carrier Reconciliation (Report 4)** in **Part 2**.

Carrier

SSN

No entry

This field is system generated. This is the enrollee's social security number.

Enrollee

No entry

This field is system generated. This is the enrollee's name.

Enrollment Code

No entry

This field is system generated. This is the enrollment code.

Payroll Office Contact

No entry

This field is system generated. This is the name of the payroll office contact.

Reason Code

No entry

This field is system generated. This is the reconciliation reason code. For a list and descriptions of reconciliation reason codes, see **Reconciliation Reason Codes Table** in **Part 4**.

Payroll Office Comments

No entry

This field is system generated. These are comments that were entered on the Payroll Office Enrollee Reconcile page.

Carrier Comments

No entry

This field is system generated. These are comments that were entered on the Carrier Enrollee Validate page.

Total Records

No entry

This field is system generated. This is the total number of enrollee records displayed on the report.

►**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◄

Payroll Office Enrollment Transmission (Report 5) Page Field Instructions

The Payroll Office Enrollment Transmission page (**Figure 2:100**) is used to produce the Payroll Office Enrollment Transmission report (**Figure 2:101**). This report shows the timeliness of the transmission of quarterly payroll office enrollment data. For instructions on using the Payroll Office Enrollment Transmission page, see **Viewing Payroll Office Enrollment Transmission (Report 5)** in **Part 2**.

Year

From

Optional default

Click the drop-down menu and select the year that begins the range of reconciliation years. If no year is selected, this field automatically defaults to the current reconciliation year.

To

Optional default

Click the drop-down menu and select the year that ends the range of reconciliation years. If no year is selected, this field automatically defaults to the current reconciliation year.

Quarter

From

Optional default

Click the drop-down menu and select the quarter that begins the range of reconciliation quarters. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

To

Optional default

Click the drop-down menu and select the quarter that ends the range of reconciliation quarters. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

Payroll Office ID

Optional

Click the drop-down menu and select the payroll office identification number.

Transmissions

Optional default

This field allows users to display search results by the options listed below. If no display option is selected, this field automatically defaults to the All option. To choose a display option, select the radio button next to one of the following values:

`All`	Displays all records related to the search criteria.
`Accepted`	Displays all accepted records related to the search criteria.
`Rejected`	Displays all rejected records related to the search criteria.
`Not Received`	Displays statistics for all transmissions that were not received.

Order By

1st

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the Payroll Office option. To choose a sort option, click the drop-down menu and select one of the following options to display the selected criteria in first sort search order:

`Payroll Office`	Sorts search results by payroll office identification number.
`Name`	Sorts search results by enrollee name.
`Year/Quarter`	Sorts search results by reconciliation year and reconciliation quarter.
`Submission Date`	Sorts search results by submission date.
`Status`	Sorts search results by transmission status.

2nd

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in second sort search order:

`Payroll Office`	Sorts search results by payroll office identification number.
`Name`	Sorts search results by enrollee name.
`Year/Quarter`	Sorts search results by reconciliation year and reconciliation quarter.
`Submission Date`	Sorts search results by submission date.
`Status`	Sorts search results by transmission status.

3rd

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in third sort search order:

`Payroll Office`	Sorts search results by payroll office identification number.
`Name`	Sorts search results by enrollee name.
`Year/Quarter`	Sorts search results by reconciliation year and reconciliation quarter.
`Submission Date`	Sorts search results by submission date.
`Status`	Sorts search results by transmission status.

►Check box to create report without totals

Optional

Select this check box to omit totals from the report.◄

Payroll Office Enrollment Transmission (Report 5) Field Descriptions

The Payroll Office Enrollment Transmission report (**Figure 2:101**) shows the timeliness of the transmission of quarterly payroll office enrollment data. For instructions on viewing the Payroll Office Enrollment Transmission report, see **Viewing Payroll Office Enrollment Transmission (Report 5)** in **Part 2**.

Payroll Office

ID

No entry

This field is system generated. This is the payroll office identification number.

Name

No entry

This field is system generated. This is the name of the payroll office.

Year

No entry

This field is system generated. This is the reconciliation year.

Quarter

No entry

This field is system generated. This is the reconciliation quarter.

Date Due

No entry

This field is system generated. This is the transmission due date (MMDDYYYY) for the reconciliation quarter.

Submission Date

No entry

This field is system generated. This is the date (MMDDYYYY) the payroll office enrollment data file was submitted for processing.

Status

No entry

This field is system generated. This field displays 000 for an accepted transmission; otherwise, a payroll office system code is displayed. It indicates the status of a payroll office enrollment data transmission. For a list and descriptions of payroll office system codes, see **Payroll Office System Codes Table** in **Part 4**.

Accepted

No entry

This field is system generated. This is the number of transmissions that passed front-end edits and were accepted for processing.

►**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◄

Rejected

No entry

This field is system generated. This is the number of transmissions that did not pass front-end edits and were rejected.

►**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◄

Not Received

No entry

This field is system generated. This is the number of transmissions that were expected but not received.

►**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◄

Total

No entry

This field is system generated. This is the sum of transmission records displayed on the report.

►**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◄

Carrier Enrollment Transmission (Report 6) Page Field Instructions

The Carrier Enrollment Transmission page (**Figure 2:102**) is used to produce the Carrier Enrollment Transmission report (**Figure 2:103**). This report shows the timeliness of the transmission of quarterly carrier enrollment data. For instructions on using the Carrier Enrollment Transmission page, see **Viewing Carrier Enrollment Transmission (Report 6)** in **Part 2**.

Year

From

Optional default

Click the drop-down menu and select the year that begins the range of reconciliation years. If no year is selected, this field automatically defaults to the current reconciliation year.

To

Optional default

Click the drop-down menu and select the year that ends the range of reconciliation years. If no year is selected, this field automatically defaults to the current reconciliation year.

Quarter

From

Optional default

Click the drop-down menu and select the quarter that begins the range of reconciliation quarters. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

To

Optional default

Click the drop-down menu and select the quarter that ends the range of reconciliation quarters. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

Carrier ID

Optional

Click the drop-down menu and select the carrier identification code.

Transmissions

Optional default

This field allows users to display search results by the options listed below. If no display option is selected, this field automatically defaults to the All option. To choose a display option, select the radio button next to one of the following values:

`All`	Displays all records related to the search criteria.
`Accepted`	Displays all accepted records related to the search criteria.
`Rejected`	Displays all rejected records related to the search criteria.
`Not Received`	Displays statistics for all transmissions that were not received.

Order By

1st

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the Carrier ID option. To choose a sort option, click the drop-down menu and select one of the following options to display the selected criteria in first sort search order:

`Carrier ID`	Sorts search results by carrier identification number.
`Name`	Sorts search results by enrollee name.
`Year/Quarter`	Sorts search results by reconciliation year and reconciliation quarter.
`Submission Date`	Sorts search results by submission date.
`Status`	Sorts search results by transmission status.

2nd

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in second sort search order:

`Carrier ID`	Sorts search results by carrier identification number.
`Name`	Sorts search results by enrollee name.
`Year/Quarter`	Sorts search results by reconciliation year and reconciliation quarter.
`Submission Date`	Sorts search results by submission date.
`Status`	Sorts search results by transmission status.

3rd

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in third sort search order:

`Carrier ID`	Sorts search results by carrier identification number.
`Name`	Sorts search results by enrollee name.
`Year/Quarter`	Sorts search results by reconciliation year and reconciliation quarter.
`Submission Date`	Sorts search results by submission date.
`Status`	Sorts search results by transmission status.

▶Check box to create report without totals

Optional

Select this check box to omit totals from the report.◀

Carrier Enrollment Transmission (Report 6) Field Descriptions

The Carrier Enrollment Transmission report (**Figure 2:103**) shows the timeliness of the transmission of quarterly carrier enrollment data. For instructions on viewing the Carrier Enrollment Transmission report, see **Viewing Carrier Enrollment Transmission (Report 6)** in **Part 2**.

Carrier

Carrier

No entry

This field is system generated. This is the carrier identification code.

Name

No entry

This field is system generated. This is the carrier’s name.

Year

No entry

This field is system generated. This is the reconciliation year.

Quarter

No entry

This field is system generated. This is the reconciliation quarter.

Date Due

No entry

This field is system generated. This is the transmission due date (MMDDYYYY) for the reconciliation quarter.

Submission Date

No entry

This field is system generated. This is the date (MMDDYYYY) the carrier enrollment data file was submitted for processing.

Status

No entry

This field is system generated. This field displays 000 for an accepted transmission; otherwise, a carrier system code is displayed. It indicates the status of a carrier enrollment data transmission. For a list and descriptions of carrier system codes, see **Carrier System Codes Table** in **Part 4**.

Accepted

No entry

This field is system generated. This is the number of transmissions that passed front-end edits and were accepted for processing.

▶**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◀

Rejected

No entry

This field is system generated. This is the number of transmissions that did not pass front-end edits and were rejected.

▶**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◀

Not Received

No entry

This field is system generated. This is the number of transmissions that were expected but not received.

▶**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◀

Total

No entry

This field is system generated. This is the sum of transmission records displayed on the report.

▶**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◀

Enrollment Change Summary (Report 7) Page Field Instructions

The Enrollment Change Summary page (**Figure 2:104**) is used to produce the Enrollment Change Summary report (**Figure 2:105**). This report displays additions and changes in enrollment between carriers and enrollment codes when comparing one quarter to any prior quarter. For instructions on using the Enrollment Change Summary page, see **Viewing Enrollment Change Summary (Report 7)** in **Part 2**.

Year

From

Optional default

Click the drop-down menu and select the year that begins the range of reconciliation years. If no year is selected, this field automatically defaults to the current reconciliation year.

To

Optional default

Click the drop-down menu and select the year that ends the range of reconciliation years. If no year is selected, this field automatically defaults to the current reconciliation year.

Quarter

From

Optional default

Click the drop-down menu and select the quarter that begins the range of reconciliation quarters. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

To

Optional default

Click the drop-down menu and select the quarter that ends the range of reconciliation quarters. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

Payroll Office ID

Required

Click the drop-down menu and select the payroll office identification number.

Carrier

Optional

Click the drop-down menu and select the carrier code.

Enrollment Code

Optional

Click the drop-down menu and select the enrollment code.

►Check box to create report without totals

Optional

Select this check box to omit totals from the report.◄

Enrollment Change Summary (Report 7) Field Descriptions

The Enrollment Change Summary report (**Figure 2:105**) displays the additions and changes in enrollment between carriers and enrollment codes when comparing one quarter to any prior quarter. For instructions on viewing the Enrollment Change Summary report, see **Viewing Enrollment Change Summary (Report 7)** in **Part 2**.

Carrier

No entry

This field is system generated. This is the carrier ID.

Code

No entry

This field is system generated. This is the enrollment code.

From (Quarter/Year)

No entry

This field is system generated. This is the number of enrollees covered by the enrollment code displayed in the Code field during the selected quarter and year.

To (Quarter/Year)

No entry

This field is system generated. This is the number of enrollees covered by the enrollment code displayed in the Code field during the selected quarter and year.

Change (#)

No entry

This field is system generated. This is the change in the number of enrollment code changes from the prior quarter to the current quarter.

Change (%)

No entry

This field is system generated. This is the change in percent of enrollment code changes from the prior quarter to the current quarter.

Enrollees (New/Add)

No entry

This field is system generated. This is the number of new or added enrollees.

Enrollees (Left/Drop)

No entry

This field is system generated. This is the number of dropped enrollees.

Total Records

No entry

This field is system generated. This is the total number of records displayed on the report.

▶**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◀

Carrier Gain/Loss Summary (Report 8) Page Field Instructions

The Carrier Gain/Loss Summary page (**Figure 2:106**) is used to produce the Carrier Gain/Loss Summary report (**Figure 2:107**). This report shows the movement of enrollees between carriers and plans (enrollment codes) when comparing one quarter to any prior quarter. For instructions on using the Carrier Gain/Loss Summary page, see **Viewing Carrier Gain/Loss Summary (Report 8)** in **Part 2**.

Year

From

Optional default

Click the drop-down menu and select the year that begins the range of reconciliation years. If no year is selected, this field automatically defaults to the current reconciliation year.

To

Optional default

Click the drop-down menu and select the year that ends the range of reconciliation years. If no year is selected, this field automatically defaults to the current reconciliation year.

Quarter

From

Optional default

Click the drop-down menu and select the quarter that begins the range of reconciliation quarters. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

To

Optional default

Click the drop-down menu and select the quarter that ends the range of reconciliation quarters. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

Carrier

Required

Click the drop-down menu and select the carrier code.

Enrollment Code

Optional

Click the drop-down menu and select the enrollment code.

Payroll Office ID

Optional

Click the drop-down menu and select the payroll office identification number.

►Check box to create report without totals

Optional

Select this check box to omit totals from the report.◄

Carrier Gain/Loss Summary (Report 8) Field Descriptions

The Carrier Gain/Loss Summary report (**Figure 2:107**) shows the movement of enrollees between carriers and plans (enrollment codes) when comparing one quarter to any prior quarter. For instructions on viewing the Carrier Gain/Loss Summary report, see **Viewing Carrier Gain/Loss Summary (Report 8)** in **Part 2**.

From (Quarter/Year)

Carrier

No entry

This field is system generated. This is the carrier code.

Code

No entry

This field is system generated. This is the enrollment code.

To (Quarter/Year)

Carrier

No entry

This field is system generated. This is the carrier code.

Code

No entry

This field is system generated. This is the enrollment code.

Enrollment Changes

Added

No entry

This field is system generated. This is the number of enrollment changes that were added.

%

No entry

This field is system generated. This is the percent of enrollment changes that were added.

Dropped

No entry

This field is system generated. This is the number of enrollment changes that were dropped.

%

No entry

This field is system generated. This is the percent of enrollment changes that were dropped.

Total Records

No entry

This field is system generated. This is the total number of records displayed on the report.

▶**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◀

Reconciliation Reason Summary (Report 9) Page Field Instructions

The Reconciliation Reason Summary page (**Figure 2:108**) is used to produce the Reconciliation Reason Summary report (**Figure 2:109**). This report shows what caused the discrepancies that were identified during the reconciliation process for a single quarter. For instructions on using the Reconciliation Reason Summary page, see **Viewing Reconciliation Reason Summary (Report 9)** in **Part 2**.

Note: Entry of at least two optional fields (e.g., Carrier, Enrollment Code, etc.) is required to produce a report.

Year

Optional default

Click the drop-down menu and select the reconciliation year. If no year is selected, this field automatically defaults to the current reconciliation year.

Quarter

Optional default

Click the drop-down menu and select the reconciliation quarter. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

Carrier

Optional

Click the drop-down menu and select the carrier code.

Enrollment Code

Optional

Click the drop-down menu and select the enrollment code.

Payroll Office ID

Optional

Click the drop-down menu and select the payroll office identification number.

Agency

Optional, alphanumeric, 4 positions

Type the agency identification code (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

Personnel Office ID

Optional, alphanumeric, 4 positions

Type the personnel office identification number.

Reason Code

Optional

Click the drop-down menu and select the reconciliation reason code. For a list and descriptions of these codes, see **Reconciliation Reason Codes Table** in **Part 4.**

Order By

1st

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the Carrier option. To choose a sort option, click the drop-down menu and select one of the following options to display the selected criteria in first sort search order:

Agency	Sorts search results by agency code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Payroll Office	Sorts search results by payroll office identification number.
Personnel Office ID	Sorts search results by personnel office identification number.
Reason Code	Sorts search results by reconciliation reason code.

2nd

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in second sort search order:

Agency	Sorts search results by agency code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Payroll Office	Sorts search results by payroll office identification number.
Personnel Office ID	Sorts search results by personnel office identification number.
Reason Code	Sorts search results by reconciliation reason code.

3rd

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in third sort search order:

Agency	Sorts search results by agency code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Payroll Office	Sorts search results by payroll office identification number.
Personnel Office ID	Sorts search results by personnel office identification number.
Reason Code	Sorts search results by reconciliation reason code.

4th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in fourth sort search order:

Agency	Sorts search results by agency code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Payroll Office	Sorts search results by payroll office identification number.
Personnel Office ID	Sorts search results by personnel office identification number.
Reason Code	Sorts search results by reconciliation reason code.

5th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in fifth sort search order:

Agency	Sorts search results by agency code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Payroll Office	Sorts search results by payroll office identification number.
Personnel Office ID	Sorts search results by personnel office identification number.
Reason Code	Sorts search results by reconciliation reason code.

6th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in sixth sort search order:

Agency	Sorts search results by agency code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Payroll Office	Sorts search results by payroll office identification number.
Personnel Office ID	Sorts search results by personnel office identification number.
Reason Code	Sorts search results by reconciliation reason code.

►Check box to create report without totals

Optional

Select this check box to omit totals from the report.◄

Reconciliation Reason Summary (Report 9) Field Descriptions

The Reconciliation Reason Summary report (**Figure 2:109**) shows what caused the discrepancies that were identified during the reconciliation process for a single quarter. For instructions on viewing the Reconciliation Reason Summary report, see **Viewing Reconciliation Reason Summary (Report 9)** in **Part 2**.

Payroll Office

No entry

This field is system generated. This is the payroll office identification number.

Carrier

No entry

This field is system generated. This is the carrier code.

Code

No entry

This field is system generated. This is the enrollment code.

Agency

No entry

This field is system generated. This is the agency identification code. This code consists of the department code and agency code.

POI

No entry

This field is system generated. This is the personnel office identification number.

Reason

No entry

This field is system generated. This is the reconciliation reason code. For a list and descriptions of reconciliation reason codes, see **Reconciliation Reason Codes Table** in **Part 4**.

Total

No entry

This field is system generated. This is the number of specified reconciliation reason codes that meet the criteria entered on the Reconciliation Reason Summary page.

Total Errors

No entry

This field is system generated. This is the sum of the numbers displayed in the Total field.

▶**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◀

Total Records

No entry

This field is system generated. This is the total number of records displayed on the report.

▶**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◀

Reconciliation Action Summary (Report 10) Page Field Instructions

The Reconciliation Action Summary page (**Figure 2:110**) is used to produce the Reconciliation Action Summary report (**Figure 2:111**). This report displays the action to be taken to correct the discrepancies identified during the reconciliation process for a single quarter. For instructions on using the Reconciliation Action Summary page, see **Viewing Reconciliation Action Summary (Report 10)** in **Part 2**.

Note: Entry of at least two optional fields (e.g., Carrier, Enrollment Code, etc.) is required to produce a report.

Year

Optional default

Click the drop-down menu and select the reconciliation year. If no year is selected, this field automatically defaults to the current reconciliation year.

Quarter

Optional default

Click the drop-down menu and select the reconciliation quarter. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

Carrier

Optional

Click the drop-down menu and select the carrier code.

Enrollment Code

Optional

Click the the drop-down menu and select the enrollment code.

Payroll Office ID

Optional

Click the drop-down menu and select the payroll office identification number.

Agency

Optional, alphanumeric, 4 positions

Type the agency identification code (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

Personnel Office ID

Optional, alphanumeric, 4 positions

Type the personnel office identification number.

Action Code

Optional

Click the drop-down menu and select the reconciliation action code. For a list and descriptions of these codes, see **Reconciliation Action Codes Table** in **Part 4**.

Order By

1st

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the Carrier option. To choose a sort option, click the drop-down menu and select one of the following options to display the selected criteria in first sort search order:

Action Code	Sorts search results by reconciliation action code.
Agency	Sorts search results by agency code.

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Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Payroll Office	Sorts search results by payroll office identification number.
Personnel Office ID	Sorts search results by personnel office identification number.

2nd

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in second sort search order:

Action Code	Sorts search results by reconciliation action code.
Agency	Sorts search results by agency code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Payroll Office	Sorts search results by payroll office identification number.
Personnel Office ID	Sorts search results by personnel office identification number.

3rd

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in third sort search order:

Action Code	Sorts search results by reconciliation action code.
Agency	Sorts search results by agency code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Payroll Office	Sorts search results by payroll office identification number.
Personnel Office ID	Sorts search results by personnel office identification number.

4th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in fourth sort search order:

Action Code	Sorts search results by reconciliation action code.
Agency	Sorts search results by agency code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Payroll Office	Sorts search results by payroll office identification number.
Personnel Office ID	Sorts search results by personnel office identification number.

5th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in fifth sort search order:

`Action Code`	Sorts search results by reconciliation action code.
`Agency`	Sorts search results by agency code.
`Carrier`	Sorts search results by carrier code.
`Enrollment Code`	Sorts search results by enrollment code.
`Payroll Office`	Sorts search results by payroll office identification number.
`Personnel Office ID`	Sorts search results by personnel office identification number.

6th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in sixth sort search order:

`Action Code`	Sorts search results by reconciliation action code.
`Agency`	Sorts search results by agency code.
`Carrier`	Sorts search results by carrier code.
`Enrollment Code`	Sorts search results by enrollment code.
`Payroll Office`	Sorts search results by payroll office identification number.
`Personnel Office ID`	Sorts search results by personnel office identification number.

▶Check box to create report without totals

Optional

Select this check box to omit totals from the report.◀

CLER Field Descriptions And Instructions

Reconciliation Action Summary (Report 10) Field Descriptions

The Reconciliation Action Summary report (**Figure 2:111**) displays the action to be taken to correct the discrepancies identified during the reconciliation process for a single quarter. For instructions on viewing the Reconciliation Action Summary report, see **Viewing Reconciliation Action Summary (Report 10)** in **Part 2**.

Payroll Office

No entry

This field is system generated. This is the payroll office identification number.

Carrier

No entry

This field is system generated. This is the carrier code.

Code

No entry

This field is system generated. This is the enrollment code.

Agency

No entry

This field is system generated. This is the agency identification code. This code consists of the department code and agency code.

POI

No entry

This field is system generated. This is the personnel office identification number.

Action

No entry

This field is system generated. This is the reconciliation action code. For a list and descriptions of reconciliation action codes, see **Reconciliation Action Codes Table** in **Part 4**.

Total

No entry

This field is system generated. This is the number of specified reconciliation action codes that meet the criteria entered on the Reconciliation Action Summary page.

Total Errors

No entry

This field is system generated. This is the sum of the numbers displayed in the Total field.

▶**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◀

Total Records

No entry

This field is system generated. This is the total number of records displayed on the report.

▶**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◀

Reconciliation Summary (Report 11) Page Field Instructions

The Reconciliation Summary page (**Figure 2:112**) is used to produce the Reconciliation Summary report (**Figure 2:113**). This report shows the progress that has been made to reconcile the discrepancies found in a single quarter. For instructions on using the Reconciliation Summary page, see **Viewing Reconciliation Summary (Report 11)** in **Part 2**.

Note: Entry of at least two optional fields (e.g., Agency, Personnel Office ID, etc.) is required to produce a report.

Payroll Office ID

Required

Click the drop-down menu and select the payroll office identification number.

Year

Optional default

Click the drop-down menu and select the reconciliation year. If no year is selected, this field automatically defaults to the current reconciliation year.

Quarter

Optional default

Click the drop-down menu and select the reconciliation quarter. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

Reconciliation Date

From

Optional

This is the beginning reconciliation date for the range of reconciliation dates. To select this date, click the first drop-down menu and select the month; click the second drop-down menu and select the day; and click the third drop-down menu and select the year.

To

Optional

This is the ending reconciliation date for the range of reconciliation dates. To select this date, click the first drop-down menu and select the month; click the second drop-down menu and select the day; and click the third drop-down menu and select the year.

Agency

Optional, alphanumeric, 4 positions

Type the agency identification code (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

Personnel Office ID

Optional, alphanumeric, 4 positions

Type the personnel office identification number.

Carrier

Optional

Click the drop-down menu and select the carrier code.

Enrollment Code

Optional

Click the drop-down menu and select the enrollment code.

Order By

1st

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the Carrier option. To choose a sort option, click the drop-down menu and select one of the following options to display the selected criteria in first sort search order:

Agency	Sorts search results by agency code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Pers. Office ID	Sorts search results by personnel office identification number.

2nd

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in second sort search order:

Agency	Sorts search results by agency code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Pers. Office ID	Sorts search results by personnel office identification number.

3rd

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in third sort search order:

Agency	Sorts search results by agency code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Pers. Office ID	Sorts search results by personnel office identification number.

4th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in fourth sort search order:

Agency	Sorts search results by agency code.
Carrier	Sorts search results by carrier code.
Enrollment Code	Sorts search results by enrollment code.
Pers. Office ID	Sorts search results by personnel office identification number.

►Check box to create report without totals

Optional

Select this check box to omit totals from the report.◄

Reconciliation Summary (Report 11) Field Descriptions

The Reconciliation Summary report (**Figure 2:113**) shows the progress that has been made to reconcile the discrepancies found in a single quarter. For instructions on viewing the Reconciliation Summary report, see **Viewing Reconciliation Summary (Report 11)** in **Part 2**.

Payroll Office

No entry

This field is system generated. This is the payroll office identification number.

Carrier

No entry

This field is system generated. This is the carrier code.

Code

No entry

This field is system generated. This is the enrollment code.

Agcy

No entry

This field is system generated. This is the agency identification code. This code consists of the department code and agency code.

POI

No entry

This field is system generated. This is the personnel office identification number.

Enrollees

No entry

This field is system generated. This is the number of enrollee records that meet the criteria entered on the Reconciliation Summary page.

Matches

No entry

This field is system generated. This is the number of matching records that meet the criteria entered on the Reconciliation Summary page.

%

No entry

This field is system generated. This is the percentage of matching records to enrollee records.

Discrepancies

#

No entry

This field is system generated. This is the number of discrepancies.

Recon

No entry

This field is system generated. This is the number of reconciled discrepancies.

%

No entry

This field is system generated. This is the percentage of reconciled discrepancies to reported discrepancies.

Unrecon

No entry

This field is system generated. This is the number of unreconciled discrepancies.

Corrective Actions

Validated

No entry

This field is system generated. This is the number of discrepancies/reconciliation actions that were validated by the carrier.

%

No entry

This field is system generated. This is the percentage of discrepancies/reconciliation actions validated to total corrective actions.

Unvalidated

No entry

This field is system generated. This is the number of discrepancies/reconciliation actions that were not validated by the carrier.

Code-Total

No entry

This field is system generated. This is the number of enrollees covered by the enrollment code displayed in the Code field.

▶**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◀

Carrier-Total

No entry

This field is system generated. This is the number of enrollees covered by the carrier for the criteria entered on the Reconciliation Summary page.

▶**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◀

Grand-Total

No entry

This field is system generated. This is the total number of records displayed on the report.

▶**Note:** If the check box used to omit totals from a report is selected, this field is not displayed.◀

▶Carrier Discrepancy Listing (Report 12) Page Field Instructions

The Carrier Discrepancy Listing page (**Figure 2:114**) is used to produce the Carrier Discrepancy Listing report (**Figure 2:115**). This report provides a listing by carrier identification code of carrier and payroll office enrollee records that match, as well as records marked with carrier warning and discrepancy codes. For instructions on using the Carrier Discrepancy Listing page, see **Viewing Carrier Discrepancy Listing (Report 12)** in **Part 2**.

Note: Entry of at least two optional fields (e.g., Error Code, Warning Code, etc.) is required to produce a report, unless you complete the **entire** SSN field, in which case, no other entries are needed.

Carrier ID

Required

Click the drop-down menu and select the carrier identification code.

Year

Optional default

Click the drop-down menu and select the reconciliation year. If no year is selected, this field automatically defaults to the current reconciliation year.

Quarter

Optional default

Click the drop-down menu and select the reconciliation quarter. If no quarter is selected, this field automatically defaults to the current reconciliation quarter.

Fail Count

To search for enrollee records by a specific fail count number or a range of fail count numbers, complete the fields as described below.

From

Optional, numeric, 3 positions max.

To search for enrollee records by a specific fail count number, type the number, then go to the To field.

To search for enrollee records by a range of fail count numbers, type the number that starts the range, then go to the To field.

To

Optional, numeric, 3 positions max.

To search for enrollee records by a specific fail count number, type the number that was typed in the From field.

To search for enrollee records by a range of fail count numbers, type the number that ends the range.

SSN

To search for a specific enrollee record by social security number (SSN), or to search for a range of enrollee records by a range of SSNs, complete the fields as described below.

Note: A search for enrollee records by **complete** enrollee SSNs will display the records without the need to complete another optional data entry field (e.g., Payroll Office ID, Enrollment Code, etc.) on this page.

From

Optional, numeric, 9 positions max.

To search for a specific enrollee record by SSN, type the SSN and skip the To field.

To search for a range of enrollee records by a range of SSNs, type the SSN that starts the range, then go to the To field.

To

Optional, numeric, 9 positions max.

When searching for a range of enrollee records by a range of SSNs, type the SSN that ends the range; otherwise, leave blank.

Payroll Office ID

Optional default

Click the drop-down menu and select your organization's payroll identification number. If no number is selected, this field automatically defaults to your organization's payroll office identification number.

Enrollment Code

Optional

Click the drop-down menu and select the enrollment code.

Error Code

Optional

Click the drop-down menu and select the error code. For a list and descriptions of these codes, see **Discrepancy Codes Table** in **Part 4**.

Warning Code

Optional

Click the drop-down menu and select the warning code. For a list and descriptions of these codes, see **Warning Codes Table** in **Part 4**.

Discrepancies

Optional default

This field allows users to display search results by the options listed below. If no display option is selected, this field automatically defaults to the All option. To choose a display option, select the radio button next to one of the following values:

All	Displays all records related to the search criteria.
Unreconciled	Displays all records with unreconciled discrepancies related to the search criteria.
Errors	Displays all records with errors related to the search criteria.
Warnings	Displays all records with warnings related to the search criteria.
Reconciled	Displays all records with reconciled discrepancies related to the search criteria.
None	Displays all records with no discrepancies related to the search criteria.
Not Validated	Displays records related to the search criteria that have not been validated.

Order By

1st

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the Name option. To choose a sort option, click the drop-down menu and select one of the following options to display the selected criteria in first sort search order:

Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
SSNO	Sorts search results by enrollee social security number.
Payroll ID	Sorts search results by payroll office identification number.

2nd

Optional default

This field allows users to sort search results by the options listed below. If no sort option is selected, this field automatically defaults to the SSNO option. To choose a sort option, click the drop-down menu and select one of the following options to display the selected criteria in second sort search order:

Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
SSNO	Sorts search results by enrollee social security number.
Payroll ID	Sorts search results by payroll office identification number.

3rd

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in third sort search order:

Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a record has failed the quarterly edit process.
Name	Sorts search results by enrollee name.
SSNO	Sorts search results by enrollee social security number.
Payroll ID	Sorts search results by payroll office identification number.

4th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in fourth sort search order:

Enrollment Code	Sorts search results by enrollment code.
Fail Count	Sorts search results by the number of times a record has failed the quarterly edit process.

`Name`	Sorts search results by enrollee name.
`SSNO`	Sorts search results by enrollee social security number.
`Payroll ID`	Sorts search results by payroll office identification number.

5th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in fifth sort search order:

`Enrollment Code`	Sorts search results by enrollment code.
`Fail Count`	Sorts search results by the number of times a record has failed the quarterly edit process.
`Name`	Sorts search results by enrollee name.
`SSNO`	Sorts search results by enrollee social security number.
`Payroll ID`	Sorts search results by payroll office identification number.

6th

Optional

Click the drop-down menu and select one of the following options to display the selected criteria in sixth sort search order:

`Enrollment Code`	Sorts search results by enrollment code.
`Fail Count`	Sorts search results by the number of times a record has failed the quarterly edit process.
`Name`	Sorts search results by enrollee name.
`SSNO`	Sorts search results by enrollee social security number.
`Payroll ID`	Sorts search results by payroll office identification number.

Check box to create report without totals

Optional

Select this check box to omit totals from the report.

Carrier Discrepancy Listing (Report 12) Field Descriptions

The Carrier Discrepancy Listing report (**Figure 2:115**) displays a listing by carrier identification code of carrier and payroll office enrollee records that match, as well as records marked with carrier warning and discrepancy codes. For instructions on viewing the Carrier Discrepancy Listing report, see Viewing Carrier Discrepancy Listing (Report 12) in **Part 2**.

Carrier

SSN

No entry

This field is system generated. This is the enrollee's social security number submitted by the carrier.

Name

No entry

This field is system generated. This is the enrollee's name submitted by the carrier.

Code

No entry

This field is system generated. This is the enrollment code submitted by the carrier.

Eff. Date

No entry

This field is system generated. This is the enrollment effective date (MM/DD/YYYY) submitted by the carrier.

Payroll Office

Payroll ID

No entry

This field is system generated. This is the payroll office identification number.

Name

No entry

This field is system generated. This is the enrollee's name submitted by the payroll office.

Code

No entry

This field is system generated. This is the enrollment code submitted by the payroll office.

Eff. Date

No entry

This field is system generated. This is the enrollment effective date (MM/DD/YYYY) submitted by the payroll office.

Discrepancy

No entry

This field is system generated. This is the error or warning code generated by CLER. For lists and descriptions of error and warning codes, see **Discrepancy Codes Table** and **Warning Codes Table** in **Part 4**.

Fail Count

No entry

This field is system generated. This is the number of times the initial discrepancy has been identified and reported.

Errors

No entry

This field is system generated. This is the sum of error codes displayed in the Discrepancy field.

Note: If the check box used to omit totals from a report is selected, this field is not displayed.

Warnings

No entry

This field is system generated. This is the sum of warning codes displayed in the Discrepancy field.

Note: If the check box used to omit totals from a report is selected, this field is not displayed.

Total Records

No entry

This field is system generated. This is the total number of enrollee records displayed on the report.

Note: If the check box used to omit totals from a report is selected, this field is not displayed.

Maintenance Field Descriptions And Instructions

This section presents the following topics:

Schedules Page Field Instructions

The Schedules page (**Figure 2:117**) is used to search for schedule records by year. For instructions on using the Schedules page, see **Viewing Schedule Records** in **Part 2**.

Year

Required, alphanumeric, 4 positions

Type the reconciliation year.

Schedules Search Results Page Field Descriptions

The Schedules Search Results page (**Figure 2:118**) displays a list of schedule records resulting from the search criteria entered on the Schedules page (**Figure 2:117**). For instructions on using the Schedules Search Results page, see **Viewing Schedule Records** in **Part 2**.

Year

No entry

This field is system generated. This is the reconciliation year.

Quarter

No entry

This field is system generated. This is the reconciliation quarter.

Start Date

No entry

This field is system generated. This is the date the input from carriers and payroll offices is processed.

Submission Reminder Date

No entry

This field is system generated. This is the date the submission reminder is sent.

Cut Off Date

No entry

This field is system generated. This is the date that CLER accepts no quarterly enrollment data from carriers or payroll offices.

Response Reminder Date

No entry

This field is system generated. This is the date a reminder regarding the lack of response to discrepancy reasons and action codes will be sent to carriers.

Schedules View Page Field Descriptions

The Schedules View page (**Figure 2:119**) displays a selected schedule record. For instructions on using the Schedules View page, see **Viewing Schedule Records** in **Part 2**.

Year

No entry

This field is system generated. This is the reconciliation year.

Quarter

No entry

This field is system generated. This is the reconciliation quarter.

Start Date

No entry

This field is system generated. This is the date the input from carriers and payroll offices is processed.

Submission Reminder Date

No entry

This field is system generated. This is the date the submission reminder is sent.

Cut Off Date

No entry

This field is system generated. This is the date that CLER accepts no quarterly enrollment data from carriers or payroll offices.

Response Reminder Date

No entry

This field is system generated. This is the date a reminder regarding the lack of response to discrepancy reasons and action codes will be sent to carriers.

Last CL10 Date

No entry

This field is system generated. This is the last date of the initial editing and processing of the payroll office enrollment file transmission.

Last CL10 Time

No entry

This field is system generated. This is the last time of the initial editing and processing of the payroll office enrollment file transmission.

Last CL20 Date

No entry

This field is system generated. This is the last date of the initial editing and processing of the carrier enrollment file transmission.

Last CL20 Time

No entry

This field is system generated. This is the last time of the initial editing and processing of the carrier enrollment file transmission.

Last CL30 Date

No entry

This field is system generated. This is the last date the payroll office enrollment record fields were edited and matched.

Last CL30 Time

No entry

This field is system generated. This is the last time the payroll office enrollment record fields were edited and matched.

Last CL40 Date

No entry

This field is system generated. This is the last date the carrier enrollment record fields were edited and matched.

Last CL40 Time

No entry

This field is system generated. This is the last time the carrier enrollment record fields were edited and matched.

Last CL50 Date

No entry

This field is reserved for future use.

Last CL50 Time

No entry

This field is reserved for future use.

Last CL60 Date

No entry

This field is system generated. This is the last date the error statistics record fields were updated.

Last CL60 Time

No entry

This field is system generated. This is the last time the error statistics record fields were updated.

Last CL70 Date

No entry

This field is reserved for future use.

Last CL70 Time

No entry

This field is reserved for future use.

Last CL80 Date

No entry

This field is system generated. This is the last date the 2809 corrective action files were processed and transmitted to the OPM Data Hub.

Last CL80 Time

No entry

This field is system generated. This is the last time the 2809 corrective action files were processed and transmitted to the OPM Data Hub.

Last CL90 Date

No entry

This field is system generated. This is the last date the 2810 corrective action files were processed and transmitted to the OPM Data Hub.

Last CL90 Time

No entry

This field is system generated. This is the last time the 2810 corrective action files were processed and transmitted to the OPM Data Hub.

Last Changed

ID

No entry

This field is system generated. This is the user identification number of the individual who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change.

Time

No entry

This field is system generated. This is the time of the most recent change.

System Codes Page Field Instructions

The System Codes page (**Figure 2:120**) is used to search for system code records. For instructions on using the System Codes page, see **Viewing System Code Records** in **Part 2**.

Display

Optional default

This field allows users to display search results by the options listed below. If no display option is selected, this field automatically defaults to the All option. To choose a display option, select the radio button next to one of the following values:

`All`	Displays all codes.
`Discrepancy`	Displays all discrepancy codes.
`Warning`	Displays all warning codes.
`Reconciliation Reason`	Displays all reconciliation reason codes.
`Reconciliation Action`	Displays all reconciliation action codes.
`Corrective Action`	Displays all corrective action response codes.
`System`	Displays all system codes.

System Codes Search Results Page Field Descriptions

The System Codes Search Results page (**Figure 2:121**) displays a list of system code records resulting from the search criteria entered on the System Codes page (**Figure 2:120**). For instructions on using the System Codes Search Results page, see **Viewing System Code Records** in **Part 2**.

Code

No entry

This field is system generated. This is the code number. For lists and descriptions of valid codes, see **CLER Reference Tables** in **Part 4**.

Affects Payroll

No entry

This field is system generated. This field is populated by value Yes or No. The value of this field indicates whether or not the code affects the payroll office.

Affects Carrier

No entry

This field is system generated. This field is populated by value Yes or No. The value of this field indicates whether or not the code affects the carrier.

Description

No entry

This field is system generated. This is descriptive text that corresponds to the code.

System Codes View Page Field Descriptions

The System Codes View page (**Figure 2:122**) displays a selected system code record. For instructions on using the System Codes View page, see **Viewing System Code Records** in **Part 2**.

Code

No entry

This field is system generated. This is the code number. For lists and descriptions of valid codes, see **CLER Reference Tables** in **Part 4**.

Affects

No entry

This field is system generated. The values listed below indicate the following:

`Payroll Office`	A selected radio button indicates the code affects the payroll office only.
`Carrier`	A selected radio button indicates the code affects the carrier only.
`Both`	A selected radio button indicates the code affects the payroll office and carrier.
`Not Applicable`	A selected radio button indicates the code affects neither the payroll office nor carrier.

Description

No entry

This field is system generated. This is descriptive text regarding the enrollment record.

Explanation

No entry

This field is system generated. This is a detailed explanation of the code.

Last Changed

ID

No entry

This field is system generated. This is the user identification number of the individual who made the most recent change to the record.

Date

No entry

This field is system generated. This is the date of the most recent change.

Time

No entry

This field is system generated. This is the time of the most recent change.

PART 4.

CLER Reference Tables

This part contains the following sections:

Discrepancy Codes Table

A discrepancy code indicates an error occurred during the edit process. A record that has no discrepancies is considered reconciled. The table below lists discrepancy codes for CLER.

Code	Description	Explanation
101	Invalid Payroll Office ID Number On Payroll Office Record	NFC will investigate these and determine which payroll office is responsible for the record.
102	Invalid Payroll Office ID Number On Carrier Record	NFC will investigate these and determine which payroll office is responsible for the record.
120	Invalid/Missing Enrollment Code On Payroll Office Record	The enrollment code is for an invalid plan or option or it is missing.
121	Invalid/Missing Enrollment Code On Carrier Record	The enrollment code is for an invalid plan or option or it is missing.
140	Missing Enrollee ID Number On Payroll Office Record	The payroll office record did not contain a value for Enrollee SSN, Alternate SSN, Pseudo SSN, or Other Payroll Office ID.
141	Missing Enrollee ID Number On Carrier Record	The carrier record did not contain a value for Enrollee SSN, Alternate SSN, Pseudo SSN, or Other Payroll Office ID.
142	Missing Last Name On Payroll Office Record	The payroll office record did not contain the last name of the enrollee.
143	Missing Last Name On Carrier Record	The carrier record did not contain the last name of the enrollee.
160	Enrollee On Carrier Record But No Payroll Office Record Found	The carrier reported this enrollee as being under your payroll office but your office reported no record for this enrollee.
161	Enrollee On Carrier Record But Reported Under Different Payroll Office	The enrollee is reported on your payroll office records and a matching carrier record was found for this enrollee, but the carrier record lists the enrollee under a different payroll office.
162	Enrollee Reported On Carrier Record Under Pay ID, But Found In Another Carr. ID	Enrollee is reported on a carrier record under the Carrier ID for the enrollment plan you submitted. However, enrollee record also found on a different Carrier ID.
163	Enrollee On Your Payroll Office Record, But No Carrier Record Found	The payroll office lists this enrollee as having coverage, but there is no corresponding carrier record.
164	Enrollee On Payroll Office And Carrier Records But Enrollment Codes Do Not Match	The enrollee is on a payroll office record and a matching carrier record was found. The enrollment codes of the two records, however, do not match.
165	Enrollee On Multiple Payroll Office Records - Reported To Each Payroll Office	This enrollee was included on more than one payroll office record. This situation usually happens when the enrollee is transferring jobs from one agency to another. Payroll offices that report having this enrollee will receive this error message and should contact the other(s) to resolve this discrepancy. Also, payroll offices that service more than one agency may have more than one record for an employee. These records will be reported to the servicing payroll office.

Code	Description	Explanation
166	Enrollee On Multiple Carrier Records	This enrollee was included in the files of one or more carriers. Payroll offices specified in the carrier records will receive this error message and should contact each other to resolve this situation.
167	Enrollee ID On Payroll Office More Than Once	Same enrollee on the same payroll office record more than once.

Warning Codes Table

A warning code indicates that there is a certain condition that was flagged by CLER during the reconciliation process that is not considered a discrepancy error. Agencies, at their discretion, may correct records flagged with these warnings, but the presence of warnings, by themselves, do not make a record unreconciled. The table below lists warning codes for CLER.

Code	Description	Explanation
201	Enrollees Name Does Not Match	For those agencies that have separate fields for the first, middle, and last name: the first and last name fields of the payroll office's record will be matched to the carrier's record, and, if they are different, there will be a warning. For those agencies that have one field for the first, middle, and last name: the last name and first name of the carrier record will be compared with the equal number of characters of the last name field of the payroll office record. If they do not match, then there will be a warning.
202	Withholdings/Contribution Amount Missing Or Incorrect	The amount of withholdings/contributions does not match the standard expected amount or is missing entirely. Some situations that may result in this warning include: Enrollee transferred from one payroll office to another within a single pay period. Enrollee did not contribute any money that particular pay period. Enrollee record shows an adjustment of previously reported premium amounts.
203	Invalid Submitting Office Number	Submitting office number on payroll office enrollee does not match any payroll office personnel office identifier contact record.

Payroll Office System Codes Table

A payroll office system code indicates the status of a payroll office enrollment data transmission. The following table lists payroll office system codes for CLER.

CLER Reference Tables

Code	Description	Explanation
301	Invalid As-Of Date	Invalid Gregorian date in the As-Of-Date field on the header record. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
302	The Footer Record Count And/Or Total Amount Not Equal To Detail Count	The Record Count and/or Total Amount listed in the FOOTER record are not equal to the actual count(s) produced from the program. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
303	Error Threshold Exceeded	The number or percentage of errors exceeded the allowed threshold or NO threshold has been set. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
304	No Footer Record	The Footer record was left off the transmission. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
305	Invalid Payroll Office ID On Footer Record	The Payroll Office ID listed on the Footer record does not match the Payroll Office ID on the Header. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
306	Invalid Payroll Office ID On Header Record	The Payroll Office ID on the Header record is invalid OR not active during this time period. The transmission will be rejected AND no table will be updated. If this is the INITIAL transmission, the processing code will need to be an I or space (for Initial transmission) when the transmission is resubmitted.
307	Invalid Reconciliation Year And/Or Quarter	The Reconciliation Year and/or Quarter does not match any record on the Schedule Table. The transmission will be rejected AND no table will be updated. If this is the INITIAL transmission, the processing code will need to be an I or space (for Initial transmission) when the transmission is resubmitted.
308	Invalid Processing Code	Either the Processing Code was Invalid or used incorrectly for the type of transmission. The transmission will be rejected AND no table will be updated. If this is the INITIAL transmission, the processing code will need to be an I or space (for Initial transmission) when the transmission is resubmitted.
309	Payroll Office Transmission Has Been Replaced	The payroll office transmission has been replaced by another transmission for the applicable year and quarter.
310	Invalid Submission Date	Invalid Gregorian date in the Submission date field on the header record. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.

Carrier System Codes Table

A carrier system code indicates the status of a carrier enrollment data transmission. The following table lists carrier system codes for CLER.

Code	Description	Explanation
401	Invalid As-Of Date	Invalid Gregorian date in the As-Of-Date field on the header record. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
402	The Footer Record Count Not Equal To Detail Count	The Record Count listed in the FOOTER record is not equal to the actual count produced from the program. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
403	Error Threshold Exceeded	The number or percentage of errors exceeded the allowed threshold or NO threshold has been set. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
404	No Footer Record	The Footer record was left off the transmission. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
405	Invalid Carrier ID On Footer Record	The Carrier ID listed on the Footer record does not match the Carrier ID on the Header record. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.
406	Invalid Carrier ID On Header Record	The Carrier ID on the Header record is invalid or not active during this time period. The transmission will be rejected AND no table will be updated. If this is the INITIAL transmission, the processing code will need to be an I or space (for Initial transmission) when the transmission is resubmitted.
407	Invalid Reconciliation Year And/Or Quarter	The Reconciliation Year and/or Quarter does not match any on the Schedule Table. The transmission will be rejected AND no table will be updated. If this is the INITIAL transmission, the processing code will need to be an I or space (for Initial transmission) when the transmission is resubmitted.
408	Invalid Processing Code	Either the Processing Code was Invalid or used incorrectly for the type of transmission. The transmission will be rejected AND no table will be updated. If this is the INITIAL transmission, the processing code will need to be an I or space (for Initial transmission) when the transmission is resubmitted.
409	Carrier Transmission Has Been Replaced	The carrier transmission has been replaced by another transmission for the applicable year and quarter.
410	Invalid Submission Date	Invalid Gregorian date in the Submission date field on the header record. The transmission will be rejected, but the TRAN_RCPT table will be updated. An R (for replacement) will need to be in the Processing Code field when the transmission is resubmitted.

Reconciliation Reason Codes Table

Reconciliation reason codes are used by agencies to explain the cause of a discrepancy. After an agency researches a discrepancy, it will enter one of the following codes into CLER to describe the reason the discrepancy occurred. The table below lists reconciliation reason codes for CLER.

Code	Description	Explanation
501	Payroll/Personnel Office Did Not Process 2809 Or 2810	Use this code when the 2809, 2810, or Employee Express transaction was not received or not processed by the payroll office. Once the payroll/personnel office has processed the change, it needs to be transmitted to the carrier.
502	Payroll/Personnel Office Did Not Process 2809 Or 2810 Correctly	Use this code when the 2809, 2810, or Employee Express transaction was created but was either entered into the system incorrectly or was not properly processed by the payroll/personnel office. Once the payroll/personnel office has processed the change, it needs to be transmitted to the carrier.
520	Carrier Did Not Process 2809 Or 2810	Use this code when the 2809, 2810, or Employee Express transaction was either not received or not processed by the carrier. The payroll/personnel office should then use CLER to create a 2809/2810 transaction that will be sent to the carrier. The 2809/2810 may be faxed or mailed to the carrier in lieu of using CLER. The 2809/2810 provided to the carrier is a reissuance of the initial form.
521	Carrier Did Not Process 2809 Or 2810 Correctly	Use this code when the 2809, 2810, or Employee Express transaction was not received or processed correctly by the carrier. The payroll/personnel office should then use CLER to create a 2809/2810 transaction that will be sent to the carrier. The 2809/2810 may be faxed or mailed to the carrier in lieu of using CLER. The 2809/2810 provided to the carrier is a reissuance of the initial form.
522	Carrier Enrolled Person Without Payroll/Personnel Office Authorization	The enrollee sent his/her information directly to the carrier (bypassing the personnel office). The carrier should never enroll an individual unless it receives the information from an authorized source, i.e., the payroll/personnel office or Employee Express. In the unlikely event it does happen, the payroll office should work with the personnel office, enrollee, and carrier to get proper enrollment paperwork that it can use to update the payroll office system.
523	Carrier Changed Plan - Enrollee Out Of Service Area	The enrollee requested a plan that is not allowed for the area in which he/she lives and the carrier automatically switched the enrollee to the correct plan. This should never happen as the carrier should never make enrollment changes unless it receives the information from an authorized source, i.e., the payroll/personnel office or Employee Express. In the unlikely event it does happen, the payroll office should work with the personnel office, enrollee, and carrier to get proper enrollment paperwork that it can use to update the payroll office system.

Code	Description	Explanation
524	Carrier Changed Option Without Payroll/Personnel Office Authorization	The enrollee sent his/her information directly to the carrier (bypassing the personnel office) or the carrier automatically changed the option when the enrollee got married or when the last dependent turned 22 years of age. The carrier should never make enrollment changes unless it receives the information from an authorized source, i.e., the payroll/personnel office or Employee Express. In the unlikely event it does happen, the payroll office should work with the personnel office, enrollee, and carrier to get the proper enrollment paperwork that they can use to update the payroll office system.
525	Carrier Rejected SF 2809 - Enrollee Out Of Service Area	The enrollee requested a plan that is not allowed for the area in which he/she lives so the carrier rejected the enrollment or enrollment change. The payroll office should work with the personnel office and enrollee to get the proper paperwork so that it can update its system and send the enrollment or enrollment change to the carrier.
526	Carrier Terminated Coverage Due To Death Of Enrollee	This should never happen as the carrier should never make enrollment changes unless it receives the information from an authorized source, i.e., the payroll/personnel office or Employee Express. In the unlikely event it does happen, the payroll office should work with the personnel office, enrollee, and carrier to get proper enrollment paperwork that they can use to update the payroll office system.
540	Enrollee In Unpaid Status - No Deductions For Pay Period	Some payroll offices only send in records for those enrollees for whom premiums were paid (either by deductions from enrollee pay or by contribution from the enrollees agency). If an enrollee did not pay that pay period but was truly enrolled, then use this code to indicate why the discrepancy occurred. For this situation, no change would be required to either the payroll office's records or the carrier's records.
541	Enrollee Separation Not Submitted Timely	Use this code if the enrollee's separation paperwork is not received promptly by the payroll office and is therefore still reported by the payroll/personnel office (and possibly the carrier) as being enrolled.
542	Enrollee Reported Under Two Payroll Offices - Transfer During Pay Period	Use this code if two different payroll offices or agencies report an enrollee because that enrollee was transferring-in during the reconciliation pay period. For this situation, no corrective action is required as both payroll offices/agencies properly reported this enrollee to CLER.
550	Transfer In Not Processed Timely By Gaining Payroll Office	Use this code when the gaining payroll office has not processed the transfer in for the enrollee's prior payroll office. Contact the other payroll office so that it can obtain the proper paperwork and update its records.
551	Transfer In Not Processed Timely By OWCP	Use this code if the carrier reports an enrollee as belonging to your payroll office even though that enrollee should be handled by the Office of Workers Compensation Program (OWCP).
552	Retiree Transfer In Not Processed Timely	Use this code if the carrier reports a retiree as still belonging to the enrollee's prior payroll office. A transfer in to correct both records needs to be processed.

Code	Description	Explanation
560	Discrepancy Due To Timing	This code should be used when the discrepancy is due solely to the difference in extraction date between the payroll office and carriers (refer to the Payroll Office Enrollment File Layout Specifications for more details). For example, the carriers extract their data on the first of the month and a payroll office that pays biweekly might extract data on the fifth. Between the first and fifth of the month, some enrollees may have dropped or changed coverage while others may have enrolled for the first time.
570	Pseudo SSN Used	Enrollees are not required to provide their SSN to the carrier so some enrollees provide a fake or pseudo SSN. This can result in a discrepancy unless the payroll office system also sends the pseudo SSN to CLER so that records can be properly matched. Use this code whenever the discrepancy is due to a pseudo SSN.
580	Other - See Comments	Use this code when no other code is suitable. Comments must be supplied to explain the reconciliation reason.
►590	OPM USE ONLY - Multiple Accounts with Shared CSA/CSF number	Civil Service Retirement Claim (CSA/CSF) number shared by more than one annuitant/survivor.
591	OPM USE ONLY - Enrollee Dropped Due to Death/Suspend Status - PO to investigate	Enrollment is dropped due to death or because the case is in suspend status - Payroll office will investigate these and notify carrier of the termination effective date.◄

Reconciliation Action Codes Table

Reconciliation action codes are used by agencies to describe which system(s) has to be updated as part of resolving a discrepancy. After an agency researches a discrepancy, it will enter one of the codes listed below in CLER.

Code	Description	Explanation
601	Payroll/Personnel Office Correction Required - Processed Through Payroll System	Use this code when only the payroll office's system needs to be updated. At its discretion, the payroll office may send the carrier a confirmation of the fact that the payroll office records were updated.
610	Carrier Correction Required - Submitted By Payroll/Personnel Office Through CLER	Use this code when only the carrier's system needs to be changed and the carrier was informed of those changes through the use of CLER's 2809/2810 online forms.
611	Carrier Correction Required - Submitted By Payroll/Personnel Office By Fax	Use this code when only the carrier system needs to be changed and the payroll/personnel office informed the carrier via a fax of the SF-2809 or SF-2810 form.
612	Carrier Correction Required - Submitted By Payroll/Personnel Office By Mail	Use this code when only the carrier system needs to be changed and the payroll/personnel office informed the carrier via a copy of the SF-2809 or SF-2810 through the mail.
620	Correction Required By Carrier And Payroll Office - Processed Through Payroll System	Use this code when both the payroll office and the carrier need to correct their records.

Code	Description	Explanation
630	Action Required By Another Payroll/Personnel Office	Use this code when the enrollee is no longer the responsibility of your payroll office but has, instead, transferred to another payroll office.
640	No Action Required	Use this code when neither the payroll office nor carrier needs to make changes to their records. For example, this code would be used in conjunction with reconciliation reason codes: 540 Enrollee In Unpaid Status - No Deductions for Pay Period. 542 Enrollee Reported Under Two Payroll Offices - Transfer During The Pay Period. 560 Discrepancy Due to Timing.

Carrier Corrective Action Response Codes Table

Carrier corrective action response codes are entered into CLER by carriers to record agreement with and completion of the requested correction specified by the agency office, or disagreement with the corrective action specified by the agency office. The following table lists the carrier corrective action response codes for CLER.

Code	Description	Explanation
701	Agree And Correction Processed Successfully	The carrier would enter this code when they agree with the change requested by the payroll office and have successfully updated its records.
721	Disagree - Enrollee Out Of Servicing Area	The carrier is unable to process the requested change because they do not offer that plan for the area where the individual lives.
722	Disagree - Last Dependent Reached Age 22	The carrier cannot change the individual to a family option because the enrollee no longer has dependents under age 22.
723	Disagree - Enrollment Terminated Due To Non-Payment of Membership Fees	The carrier cannot enroll or update enrollment for this individual because the enrollment has been terminated due to the non-payment of dues.
724	Other - See Comments	Use this code when no other code is suitable. Comments must be supplied to explain the Corrective Action.

State, U.S. Territory, And Overseas Military Abbreviations Table

The following table lists valid state, U.S. territory, and overseas military abbreviations for CLER.

Abbreviation	Description
AA	Armed Forces Americas (except Canada and United States of America)
AE	Armed Forces Africa, Canada, Europe, and Middle East

Abbreviation	Description
AK	Alaska
AL	Alabama
AP	Armed Forces Pacific
AR	Arkansas
AS	American Samoa
AZ	Arizona
CA	California
CO	Colorado
CT	Connecticut
DC	District of Columbia
DE	Delaware
FL	Florida
FM	Federated States of Micronesia
GA	Georgia
GU	Guam
HI	Hawaii
IA	Iowa
ID	Idaho
IL	Illinois
IN	Indiana
KS	Kansas
KY	Kentucky
LA	Louisiana
MA	Massachusetts
MD	Maryland
ME	Maine
MH	Marshall Islands
MI	Michigan
MN	Minnesota
MO	Missouri
MP	Northern Mariana Islands
MS	Mississippi
MT	Montana
NC	North Carolina
ND	North Dakota
NE	Nebraska
NH	New Hampshire
NJ	New Jersey
NM	New Mexico

Abbreviation	Description
NV	Nevada
NY	New York
OH	Ohio
OK	Oklahoma
OR	Oregon
PA	Pennsylvania
PR	Puerto Rico
PW	Palau
RI	Rhode Island
SC	South Carolina
SD	South Dakota
TN	Tennessee
TX	Texas
UT	Utah
VA	Virginia
VI	Virgin Islands
VT	Vermont
WA	Washington
WI	Wisconsin
WV	West Virginia
WY	Wyoming

Country Codes Table

The following table lists valid country codes for CLER.

Country	Code
Afghanistan	AF
Albania	AL
Algeria	AG
American Samoa	AQ
Andorra	AN
Angola	AO
Anguilla	AV
Antarctica	AY
Antigua and Barbuda	AC
Argentina	AR
Armenia	AM
Aruba	AA

Country	Code
Ashmore and Cartier Islands	AT
Australia	AS
Austria	AU
Azerbaijan	AJ
Bahamas, The	BF
Bahrain	BA
Baker Island	FQ
Bangladesh	BG
Barbados	BB
Bassas da India	BS
Belarus	BO
Belgium	BE
Belize	BH
Benin	BN
Bermuda	BD
Bhutan	BT
Bolivia	BL
Bosnia and Herzegovina	BK
Botswana	BC
Bouvet Island	BV
Brazil	BR
British Indian Ocean Territory	IO
British Virgin Islands	VI
Brunei	BX
Bulgaria	BU
Burkina Faso	UV
Burma	BM
Burundi	BY
Cambodia	CB
Cameroon	CM
Canada	CA
Cape Verde	CV
Cayman Islands	CJ
Central African Republic	CT
Chad	CD
Chile	CI
China	CH
Christmas Island	KT
Clipperton Island	IP

Country	Code
Cocos (Keeling) Islands	CK
Colombia	CO
Comoros	CN
Congo, Democratic Republic of the	CG
Congo, Republic of the	CF
Cook Islands	CW
Coral Sea Islands	CR
Costa Rica	CS
Cote d’Ivoire	IV
Croatia	HR
Cuba	CU
Cyprus	CY
Czech Republic	EZ
Denmark	DA
Djibouti	DJ
Dominica	DO
Dominican Republic	DR
East Timor	TT
Ecuador	EC
Egypt	EG
El Salvador	ES
Equatorial Guinea	EK
Eritrea	ER
Estonia	EN
Ethiopia	ET
Europa Island	EU
Falkland Islands (Islas Malvinas)	FA
Faroe Islands	FO
Fiji	FJ
Finland	FI
France	FR
French Guiana	FG
French Polynesia	FP
French Southern and Antarctic Lands	FS
Gabon	GB
Gambia, The	GA
Gaza Strip	GZ
Georgia	GG
Germany	GM

Country	Code
Ghana	GH
Gibraltar	GI
Glorioso Islands	GO
Greece	GR
Greenland	GL
Grenada	GJ
Guadeloupe	GP
Guatemala	GT
Guernsey	GK
Guinea	GV
Guinea-Bissau	PU
Guyana	GY
Haiti	HA
Heard Island and McDonald Islands	HM
Honduras	HO
Hong Kong	HK
Howland Island	HQ
Hungary	HU
Iceland	IC
India	IN
Indonesia	ID
Iran	IR
Iraq	IZ
Ireland	EI
Israel	IS
Italy	IT
Jamaica	JM
Jan Mayen	JN
Japan	JA
Jarvis Island	DQ
Jersey	JE
Johnston Atoll	JQ
Jordan	JO
Juan de Nova Island	JU
Kazakhstan	KZ
Kenya	KE
Kingman Reef	KQ
Kiribati	KR
Korea, North	KN

Country	Code
Korea, South	KS
Kuwait	KU
Kyrgyzstan	KG
Laos	LA
Latvia	LG
Lebanon	LE
Lesotho	LT
Liberia	LI
Libya	LY
Liechtenstein	LS
Lithuania	LH
Luxembourg	LU
Macau	MC
Macedonia, The Republic of	MK
Madagascar	MA
Malawi	MI
Malaysia	MY
Maldives	MV
Mali	ML
Malta	MT
Man, Isle of	IM
Marshall Islands	RM
Martinique	MB
Mauritania	MR
Mauritius	MP
Mayotte	MF
Mexico	MX
Micronesia, Federated States of	FM
Midway Islands	MQ
Moldova	MD
Monaco	MN
Mongolia	MG
Montserrat	MH
Morocco	MO
Mozambique	MZ
Namibia	WA
Nauru	NR
Navassa Island	BQ
Nepal	NP

Country	Code
Netherlands	NL
Netherlands Antilles	NT
New Caledonia	NC
New Zealand	NZ
Nicaragua	NU
Niger	NG
Nigeria	NI
Niue	NE
Norfolk Island	NF
Northern Mariana Islands	CQ
Norway	NO
Oman	MU
Pakistan	PK
Palau	PS
Palmyra Atoll	LQ
Panama	PM
Papua New Guinea	PP
Paracel Islands	PF
Paraguay	PA
Peru	PE
Philippines	RP
Pitcairn Islands	PC
Poland	PL
Portugal	PO
Qatar	QA
Reunion	RE
Romania	RO
Russia	RS
Rwanda	RW
Saint Helena	SH
Saint Kitts and Nevis	SC
Saint Lucia	ST
Saint Pierre and Miquelon	SB
Saint Vincent and the Grenadines	VC
Samoa	WS
San Marino	SM
Sao Tome and Principe	TP
Saudi Arabia	SA
Senegal	SG

Country	Code
Serbia and Montenegro	YI
Seychelles	SE
Sierra Leone	SL
Singapore	SN
Slovakia	LO
Slovenia	SI
Solomon Islands	BP
Somalia	SO
South Africa	SF
South Georgia and the Islands	SX
Spain	SP
Spratly Islands	PG
Sri Lanka	CE
Sudan	SU
Suriname	NS
Svalbard	SV
Swaziland	WZ
Sweden	SW
Switzerland	SZ
Syria	SY
Taiwan	TW
Tajikistan	TI
Tanzania	TZ
Thailand	TH
Togo	TO
Tokelau	TL
Tonga	TN
Trinidad and Tobago	TD
Tromelin Island	TE
Tunisia	TS
Turkey	TU
Turkmenistan	TX
Turks and Caicos Islands	TK
Tuvalu	TV
Uganda	UG
Ukraine	UP
United Arab Emirates	AE
United Kingdom	UK
United States	US

Country	Code
Uruguay	UY
Uzbekistan	UZ
Vanuatu	NH
Vatican City	VT
Venezuela	VE
Vietnam	VM
Wake Island	WQ
Wallis and Futuna	WF
West Bank	WE
Western Sahara	WI
Yemen	YM
Zambia	ZA
Zimbabwe	ZI

PART 5.

Exhibits

This part contains the following sections:

1. Form SF-2809, Health Benefits Election Form

FEHB Federal Employees Health Benefits Program

Form Approved: OMB No. 3206-0160

Health Benefits Election Form

Federal Employees Health Benefits Program

For **Employees, Former Spouses Under the Spouse Equity Law, and Individuals Eligible for Temporary Continuation of Coverage**

- *Complete Parts A and G, and Parts B, C, D, E, and F as applicable.*

Do not separate the copies. Your employing office will certify the completed form and return your copy to you.

- *Type or print firmly*
- *Sign and date in Part*

Part A - *Fill in this part.*

1. Name *(last, first, middle initial)*
2. Social Security Number
3. Date of birth *(mm/dd/yyyy)*
4. Your home mailing address *(include ZIP code)*
5. Sex ☐ Male ☐ Female
6. Are you now married? ☐ Yes ☐ No
7. Daytime telephone number *(include area code)*

Part B - *Fill in this part if you wish to enroll or change your enrollment in the Federal Employees Health Benefits (FEHB) Program.*

1. I elect to enroll in a health benefits plan as shown below. *(Copy the information requested below from front cover of brochure of the plan you select.)*

Name of plan | Enrollment code

2a. Names of family members *(last, first, middle initial)*	2b. ZIP code	2c. Date of birth *(mm/dd/yyyy)*	2d. Sex	2e. Relationship "code"	2f. Social Security Number *(see instructions)*

3a. Do you, your spouse or any other eligible family members have any group health insurance coverage other than the FEHB plan in which you are now enrolling or enrolled? ☐ No ☐ Yes → Complete 3b

Name of policyholder *(last, first, middle initial)*

3b. Type of insurance ☐ Medicare *You* ☐ A ☐ B *Your spouse* ☐ A ☐ B ☐ TRICARE (Including CHAMPUS) ☐ Other *(specify name)*

Part C - *Fill in this part, as well as PART B, to change enrollment.*

1. Present Plan name
2. Present Plan enrollment code →

Part D - *Event*

1. Event code that permits change *(see Table of Permissible Changes)*
2. Date of event that permits change *(mm/dd/yyyy)*

Part E - *Employees Only*

Place an "X" in the box below if you wish NOT TO ENROLL in the FEHB Program.

☐ I elect not to enroll in the Federal Employees Health Benefits Program.

My signature in PART G certifies that I have read and understand the information on page 4 regarding this election.

Part F - *Cancellation*

Place an "X" in the box below if you wish to CANCEL your enrollment.

Present Plan enrollment code

☐ I elect to cancel my enrollment in the Federal Employees Health Benefits Program. I am currently enrolled under the code shown above.

My signature in PART G certifies that I have read the information in the instructions on page 4 regarding cancellation of enrollment and that I understand that I must meet the 5-year requirement to qualify for FEHB coverage after retirement.

Part G - *Fill in this part.*

WARNING: Any intentionally false statement in this application or willful misrepresentation relative thereto is a violation of the law punishable by a fine of not more than $10,000 or imprisonment of not more than 5 years, or both. (18 U.S.C. 1001.)

1. Your signature *(do not print)*
2. Date *(mm/dd/yyyy)*

Part H - *To be completed by agency*

1. Name and address of employing office *(include ZIP code)*
2. Date received in employing office *(mm/dd/yyyy)*
3. Effective date of action *(mm/dd/yyyy)*
4. SF 2811 report number
5. Payroll office number
6. Payroll contact and telephone number *(including area code)* (   )
7. Personnel contact and telephone number *(including area code)* (   )
8. Signature of authorized agency official and telephone number *(including area code)* (   )

Remarks

Office of Personnel Management

NSN 7540-01-231-6227

Copy 1 - OFFICIAL PERSONNEL FOLDER

Standard Form 2809
Revised July 1999
Previous editions are not usable.

2. Form SF-2809-1, Health Benefits Election Form

Form Approved:
OMB No. 3206-0239

FEHB Federal Employees Health Benefits Program

Health Benefits Election Form

Federal Employees Health Benefits Program

For **Annuitants (other than CSRS/FERS), Compensationers, Former Spouses Under the Spouse Equity Law, and Individuals Eligible for Temporary Continuation of Coverage**

- *Complete Parts A and F and Parts B, C, D, and E as applicable.*

Do not separate the copies. Your employing office will certify the completed form and return your copy to you.

- *Type or print firmly*
- *Sign and date in Part F*

Part A - *Fill in this part.*

1. Name *(last, first, middle initial)*	2. Social Security Number	3. Date of birth *(mo., day, yr.)* ___/___/______
4. Your home mailing address *(include ZIP code)*	5. Sex ☐ Male ☐ Female	6. Are you now married? ☐ Yes ☐ No
	7. Daytime telephone number *(including area code)* ( )	

Part B - *Fill in this part if you wish to enroll or change your enrollment in the Federal Employees Health Benefits (FEHB) Program.*

1. I elect to enroll in a health benefits plan as shown below. *(Copy the information requested below from front cover of brochure of the plan you select.)*

Name of plan *(you want to enroll in)*	Enrollment code

2a. Names of family members *(last, first, middle initial)*	2b. ZIP code	2c. Date of birth *(mo., day, yr.)*	2d. Sex	2e. Relation-ship "code"	2f. Social Security Number *(see instructions)*
		___/___/______			
		___/___/______			
		___/___/______			
		___/___/______			

3a. Do you, your spouse or any other eligible family members have any group health insurance coverage other than the FEHB plan in which you are now enrolling or enrolled? ☐ No ☐ Yes → Complete 3b

Name of policyholder *(last, first, middle initial)*

3b. Type of insurance ☐ Medicare *You* ☐ A ☐ B *Your spouse* ☐ A ☐ B ☐ TRICARE (Including Champus) ☐ Other *(specify name)*

Part C - *Fill in this part, as well as PART B, to change enrollment.*

1. Present Plan name *(the plan you are leaving)*
2. Present Plan enrollment code →

Part D - *Event*

1. Event code that permits change *(see Table of Permissible Changes)*
2. Date of event that permits change *(mo., day, yr.)* ___/___/______

Part E - *Cancellation*

Place an "X" in the box below only if you wish to CANCEL your enrollment.

☐ I elect to cancel my enrollment in the Federal Employees Health Benefits Program. I am currently enrolled under the code shown here → Present Plan enrollment code

My signature in PART F certifies that I have read the information in the instructions on page 4 regarding cancellation of enrollment .

Part F - *Fill in this part.*

WARNING: Any intentionally false statement in this application or willful misrepresentation relative thereto is a violation of the law punishable by a fine of not more than $10,000 or imprisonment of not more than 5 years, or both. (18 U.S.C. 1001.)

1. Your signature *(do not print)*	2. Date *(mo., day, yr.)* ___/___/______

Part G - *To be completed by agency*

1. Name and address of employing office *(include ZIP code)*	2. Date received in employing office *(mo., day, yr.)* ___/___/______	3. Effective date of action *(mo., day, yr.)* ___/___/______	4. SF 2811 report number
	5. Payroll office number	6. Payroll contact and telephone number *(including area code)* ( )	
	7. Personnel contact and telephone number *(including area code)* ( )		
	8. Signature of authorized agency official and telephone number *(including area code)* ( )		

Remarks

Office of Personnel Management

NSN 7540-01-466-9084

Copy 1 - OFFICIAL PERSONNEL FOLDER

Standard Form 2809-1
July 1999

3. Form SF-2810, Notice Of Change In Health Benefits Enrollment

FEHB
Federal Employees
Health Benefits Program

Notice of Change in Health Benefits Enrollment

Part A - Identifying Information

1. Name *(Last, first, middle initial)*	2. Date of birth	3. Social security number
4. Home address *(including ZIP Code)*	5. Payroll office number	6. Enrollment code number
	7. SF 2811 Report number	8. Date this action becomes effective

Only the item that is checked below affects your enrollment. Read that item carefully and follow any pertinent instructions. Keep this form for your records.

Part B - Termination

☐ Your enrollment terminates on the date in Part A, item 8, above. However, your coverage is extended for 31 days after that date.

Important Notice: **You have the right to convert to an individual (nongroup) contract with the carrier of your plan. You also may have the right to temporarily continue your group coverage.** See **Part B - Termination** on the back of this form for information about 31-day extension of coverage, conversion, and temporary continuation of coverage.

If termination is due to death of enrollee enter date of death | Date of death (mo, dy, yr)

Part C - Transfer In

☐ The new Payroll Office (or Retirement System) shown in Part H below has accepted transfer of this enrollment and will continue it.

Part D - Reinstatement

☐ Your enrollment has been reinstated effective on the date in Part A, item 8, above.

Part E - Change in Name of Enrollee

☐ The name under which this enrollment is carried has been changed to:

Name	Date of Birth
Address (including ZIP Code) if different from Part A, item 4, above.	

Part F - Change In Enrollment-Survivor Annuitant

☐ Your enrollment has been changed from family coverage to self only. Your plan will send you a new identification card. Your new enrollment code number is shown below. (Note: This item is completed by Retirement Systems only.)

New Enrollment Code Number

Part G - Remarks

Part H - Date of Notice

Note: Instructions for Employing Offices are on the back of Copy 4 of this form.

Name and address of agency *(including ZIP Code)*	Personnel contact and telephone number ( )
	Payroll contact and telephone number ( )
Signature of authorized agency official	Date

U.S. Office of Personnel Management
CSRS/FERS Handbook for Personnel and Payroll Offices
NSN 7540-01-232-1234
Copy 1 - To Enrollee
2810-104
Previous edition is usable
Standard Form 2810
Revised June 1995

4. Form CLERP, CLER Security Access, Payroll Office/Human Resource Office Personnel

CLER Security Access
Payroll Office/Human Resource Office Personnel

1. User ID	2. Name	3. User Reference Number	4. Phone No.	5. PON(s) Access	6. POI Number(s) Access for HR Offices	7. Access: Update (U) Inquiry (I) Xmit	8. Address	9. E-mail Address	10. Remarks

FORM CLERP

Submitting Security Officer (or alternate) Name and Phone Number:____________________

Exhibits

PART 6.

Glossary

Agency ID. The 4-position agency identification code assigned by OPM and used to identify a Federal agency. The first and second positions of this code indicate the department, and the third and fourth positions indicate the agency (example: AG90 for U.S. Department of Agriculture, Office of the Chief Financial Officer).

Carrier. An organization responsible for providing FEHB enrollees with health insurance coverage.

Carrier (code). The 4-position carrier code assigned by NFC's CLER Operations and Reconciliation Unit and used to identify a health insurance provider (example: BCBS for Blue Cross/Blue Shield).

Carrier ID. The 7-position carrier identification code assigned by NFC's CLER Operations and Reconciliation Unit and used to identify a carrier. This code consists of the Carrier code and the carrier's enrollment data transmission location code (example: BCBS100 for Blue Cross/Blue Shield).

Country Code. The 2-position code used to identify a country. For a list and descriptions of country codes, see **Country Codes Table** in **Part 4**.

Enrollment Code. The 3-position code assigned by OPM and used to identify an FEHB enrollee's enrollment plan and option.

Fail Count. The number of times an enrollee record failed the quarterly edit process.

FEHB. The Federal Employees Health Benefits (FEHB) insurance program the Federal Government offers its employees.

►**FTP (File Transfer Protocol).** The protocol for exchanging files over the Internet.◄

►**ISAKMP (Internet Security Association and Key Management Protocol).** The definitions and procedures for authenticating communication between two peers.◄

►**IP (Internet Protocol).** A protocol that defines how information gets sent between servers or systems across the Internet.◄

►**IPSEC (Internet Protocol Security).** A protocol that provides security for the transmission of sensitive information over unprotected networks such as the Internet.◄

Password. The password assigned by NFC's Information System Security Office (ISSO) and used to access CLER. The user may change this password after he/she initially accesses CLER.

Payroll Office. A Federal organization responsible for coordinating an FEHB enrollee's coverage and premium collections.

Payroll Office ID. The 8-position code assigned by OPM and used to identify a payroll office (example: 12400001 for NFC).

►**Peer.** A unit of communications hardware or software that is on the same protocol layer of a network as another.◄

►**Peer to Peer.** Communication between two network devices that have the same status on the network.◄

Personnel Office. A Federal organization authorized to appoint and separate Federal employees, and to the extent such functions have been delegated, prepare personnel actions, maintain official personnel records, and administer programs for staff compensation, training and development, benefits and awards, and employee and labor relations.

Personnel Office ID. The 4-position code assigned by OPM and used to identify a personnel office (example: 5317 for NFC).

Plan. The 2-position code assigned by OPM and used to identify an enrollee's enrollment plan. This code is first two positions of the enrollment code.

POI. The 4-position Personnel Office Identifier (POI) code assigned by OPM and used to identify a personnel office (example: 5317 for NFC).

Pseudo SSN. An identification number used by an enrollee in lieu of a social security number.

Survivor Annuitant. A surviving family member of a deceased Federal employee or annuitant who is entitled to an annuity under a retirement system established for employees.

►**TCP/IP (Transmission Control Protocol/Internet Protocol).** The suite of communications protocols used to connect hosts on the Internet.◄

User ID. The user identification code assigned by NFC's ISSO and used to access CLER.

►**VPN (Virtual Private Network).** A network that is constructed by using public wires to privately connect nodes.◄

►**3DES (Triple Data Encryption Standard).** A program module of the DES encryption algorithm that encrypts data three times.◄

Heading Index

This index provides an alphabetical list of all headings in the procedure. When a heading is referenced, you can use this index to locate the page number.

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